

<b>AWARD/CONTRACT</b>		1. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 350)		RATING		PAGE 1 OF 137 PAGES	
2. CONTRACT (Proc. Inst. Ident.) NO. <b>GS00V08PDD0068</b>		3. EFFECTIVE DATE Same as Block 20C		4. REQUISITION/PURCHASE REQUEST/PROJECT NO. Not Applicable			
5. ADMINISTERED BY (If other than Item 5) CODE		6. ADMINISTERED BY (If other than Item 5) CODE					
General Services Administration Central Office Contracting Division (ACM-D) 1800 F Street, NW (Room G-127) Washington, D.C. 20405 Robert H. Corey (202) 501-1797 bob.corey@gsa.gov		Same as Block 5					
7. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)				8. DELIVERY			
Vangent, Incorporated 4250 North Fairfax Drive, Suite 1200 Arlington, VA 22203				<input type="checkbox"/> FOB ORIGIN <input checked="" type="checkbox"/> OTHER (See below)			
				9. DISCOUNT FOR PROMPT PAYMENT  Net 30 Days			
10. SUBMIT INVOICES (4 copies unless otherwise specified) TO THE ADDRESS SHOWN IN		ITEM		See Section G			
CODE		FACILITY CODE					
11. SHIP TO/MARK FOR CODE		12. PAYMENT WILL BE MADE BY CODE					
"Ship To" address will be cited on individual task orders		"Payment Office" address will be cited on individual task orders					
13. AUTHORITY FOR USING OTHER THAN FULL AND OPEN COMPETITION:		14. ACCOUNTING AND APPROPRIATION DATA					
<input type="checkbox"/> 10 U.S.C. 2304(c) ( ) <input type="checkbox"/> 41 U.S.C. 253(c) ( )		Will be cited on individual task orders					
15A. ITEM NO.	15B. SUPPLIES/SERVICES	15C. QUANTITY	15D. UNIT	15E. UNIT PRICE	15F. AMOUNT		
	The Contractor shall provide a wide range of automated and manual customer support services to respond to inquiries about Federal Government programs, policies, information sources and agencies from the general public and other sources, all in accordance with Section C, Performance Work Statement. An asterisk in Section I indicates a clause that was added after release of the solicitation.				Overall Contract Minimum Order Amount (See Section H.2)		
15G. TOTAL AMOUNT OF CONTRACT					\$ 10,000.00		
16. TABLE OF CONTENTS							
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CONTRACTING OFFICER WILL COMPLETE ITEM 17 OR 18 AS APPLICABLE							
17. <input checked="" type="checkbox"/> CONTRACTOR'S NEGOTIATED AGREEMENT (Contractor is required to sign this document and return 2 copies to issuing office.) Contractor agrees to furnish and deliver all items or perform all the services set forth or otherwise identified above and on any continuation sheets for the consideration stated herein. The rights and obligations of the parties to this contract shall be subject to and governed by the following documents: (a) this award/contract, (b) the solicitation, if any, and (c) such provisions, representations, certifications, and specifications, as are attached or incorporated by reference herein. (Attachments are listed herein.)				18. <input type="checkbox"/> AWARD (Contractor is not required to sign this document.) Your offer on Solicitation Number _____ including the additions or changes made by you which additions or changes are set forth in full above, is hereby accepted as to the items listed above and on any condition sheets. This award consummates the contract which consists of the following documents: (a) the Government's solicitation and your offer, and (b) this award/contract. No further contractual document is necessary.			
19A. NAME AND TITLE OF SIGNER (Type or print)				20A. NAME OF CONTRACTING OFFICER			
[Redacted] Director of Contracts				Robert H. Corey, Contracting Officer General Services Administration			
19C. DATE SIGNED				20B. DATE SIGNED		20C. DATE SIGNED	
3/6/08				(b) (6)		3/11/2008	



**SECTION B**

**SCHEDULE OF SUPPLIES OR SERVICE**

**B.1 DESCRIPTION OF SERVICES**

The Contractor shall furnish all personnel, facilities, technology infrastructure, supplies, and services required to plan, implement, operate, and manage multi-channel contact center services as specified in Section C, Statement of Work (SOW).

**B.1.1 Project Start-Up**

Charges associated with Project Start-Up shall include one or more of the following:

a) Facility and Equipment – Costs incurred to prepare the site and systems at each center to support task requirements, including facility, equipment, supplies and services.

b) Initial/Special Training – Labor and supply costs incurred to develop training materials and to conduct training of the initial complement of Information Specialists (ISs) or any additional ISs above the initial complement needed to support task requirements (note that this does not include any training costs for new personnel to replace ISs who leave the project [for example, through attrition training] or for any on-going or refresher training conducted by the Contractor to ensure compliance with performance requirements).

c) Knowledge and Content Development – Labor and supply costs incurred to develop and prepare the knowledge base to support task requirements.

d) Project Implementation Support – Labor, travel and supply costs incurred in support of start-up activities.

**B.1.1.1 Facility and Equipment**

This is a one-time charge to be paid for all facility, equipment, software, supplies and services needed at each center to support task requirements. The charge includes a fixed base component plus an incremental component.

**B.1.1.2 Initial/Special Training**

This is a one-time charge to be paid for labor and supply costs incurred to develop training materials and train the initial complement of ISs or any additional ISs above the initial complement needed to support task requirements. The charge can also be applied to any training or related activities directed by the Government to accommodate specific needs. The charge includes labor and supply costs for course development, training materials, and instructors and the labor costs for Information Specialists attending the training or related activities. This charge does not apply to any on going or refresher training conductor by the contractor to

ensure compliance of performance requirements or training of replacement ISs due to attrition or other causes.

#### **B.1.1.3 Knowledge and Content Development**

This is a one-time charge to be paid for labor and supply costs incurred to develop the knowledgebase to support task requirements.

#### **B.1.1.4 Project Implementation Support**

This is a fixed fully burdened hourly charge for technical support needed during project implementation. This charge shall cover all work performed to make the contact center(s) fully operational, including achieving security certification and accreditation (C&A) on contractor's information systems in accordance with National Institute of Standards and Technology (NIST) and agency security requirements. Ongoing support for maintaining the facility and technology infrastructure and compliance with security requirements after C&A is achieved shall be included in Core Project Management and Incremental Project Management Support. Project Implementation Support functions may consist of support provided by one or more of the following labor groups, as defined in Sections C.3.5.2 through C.3.5.9:

- Site Management
- Program Management
- Technology Management
- Information Systems Security
- Content and Knowledge Management
- Contact/Case Management
- Relationship Management
- Customer Satisfaction Survey

#### **B.1.2 Project Management**

This is a fixed charge to be paid for all technical and management services as defined in Section C.3.5 of the Statement of Work, including routine travel, as defined in Section H.15.1, required to support task requirements. The charge includes a Core Project Management Support component and, if necessary, an Incremental Support component. Core Project Management Support and Incremental Project Management Support cost components apply only to solutions involving dedicated resources. Project management support costs for shared or non-dedicated solutions are included in the hourly rate for such solutions.

##### **B.1.2.1 Core Project Management Support**

This is the fixed monthly charge to be paid for all work performed to support the project after the contact center(s) become fully operational, including all non-incremental core



project management staff (e.g., Contractor's Project Manager, site manager, technical and security personnel, human resource personnel, administrative personnel, knowledge specialists, etc.), routine travel, and support services required to support task requirements. Core Project Management Support is the minimum resource level that the contractor has allocated in order to perform all of the project management functions identified in Section C.3.5 for each project complexity level for a dedicated single site solution. For dedicated solutions involving multiple sites and/or more complex implementation, the Contractor may augment the Core Project Management Support with Incremental Project Management Support identified in Section B.1.2.2 below.

#### **B.1.2.2 Incremental Project Management Support**

This is the fixed hourly charge for incremental support needed to accommodate specialized and unique requirements, or new requirements added subsequent to initial project implementation that require additional resources beyond those provided for under Core Project Management Support. The support may be ordered as a one-time support for a specialized project or for recurring support to augment the Core Project Management Support. The incremental support may consist of support provided by one or more of the following labor groups, as defined in Section C.3.5.2 thru C.3.5.9:

#### **B.1.3 Telecommunications Services, Automated Services, and Other Support Services**

These are charges for services provided and maintained by the Contractor in support of task requirements for the duration of the performance period. Charges may include a one-time service initiation or change order charge and a monthly recurring or usage-sensitive charge. The one-time charge may be a fixed unit rate or hourly labor rate. The recurring charge may be a monthly charge or usage-sensitive charge based on a fixed unit or hourly labor rate.

#### **B.1.4 Attended Services – Dedicated Solution**

These are charges for providing attended services using resources that are dedicated to the specific task. The requisite skill levels of the Information Specialists utilized to provide the services are those defined in Sections C.3.2 and C.4 respectively. The "IS Hourly Rate" is the fully burdened fixed unit rate to be paid for each hour of work performed by an IS for a specific task. The fixed IS Hourly Rate reflects the blended hourly rate for work performed by an IS plus any support personnel (e.g., quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment and software, and maintenance required to support the IS in the performance of task requirements.

#### **B.1.5 Attended Services – Shared or Non-Dedicated Solution**

These are charges for providing temporary or long-term attended services using non-dedicated resources provided and managed by the Contractor. *The fixed unit rate reflects the fully burdened rate for work performed by an IS plus project management and any support personnel (e.g., project and site managers, supervisors, quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and maintenance required to support the IS in the performance of task requirements.* The charges are based on the actual handling time (including call wrap-up time) required for

Information Specialists to respond to telephone and e-mail inquiries using prepared scripts/responses. Content for scripts/responses will be provided by the Government or developed by the Contractor. The charges are subject to a minimum service charge for specific minimum daily call volume commitment when the project is active. The minimum service charge shall not apply when the project is in the non-active state. "Non-active state" is defined as any days that the Government has specified in the task order and/or operating directives as non-business days. The minimum service charge is calculated based on the minimum daily call volume commitment multiplied by the number of days the project is active during the month. For tasks that require support beyond normal business hours, the minimum service charge is the aggregate of the service charges for each time period of coverage (Normal Business Hours, Nights, Saturdays and Sundays, Holidays) during the month.

## **B.2 PRICE TABLES**

Prices identified in this section represent the ceiling prices for each of the contract items for the two-year base period, and each of the contract's four (4) two-year option periods.

The pricing tables also contain Extended Periods. Each Extended Period is one year in length. The purpose of the extended periods is to allow the Government to issue a task order, with a maximum performance period of five years, up to the last day of the last contract option period that is exercised

The Contractor may bid a lower price for any contract items in response to a task order request. The unit prices contained in the price tables below are used to create the one-time and recurring charges for individual task orders.

### **B.2.1.3.2 Information Specialist (IS)/Supervisor Hourly Rate While In Training**

This is the fixed unit rate to be paid for each hour an IS or IS Supervisor is in initial training in preparation of the task. Separate rates are provided for Normal Business Hours, Nights, Saturdays and Sundays, and Holidays, as defined below. This rate shall also apply for any training requested by the Government subsequent to the initial training.

*Normal Business Hours* are defined as the time period between 7:00 am to 9:00 pm local time, Monday through Friday, except designated federal holidays.

*Nights* are defined as the time period between 12:01 am and 7:00 am local time on Monday, and between 9:00 pm and 7:00 am local time, Monday through Friday, except designated federal holidays.

*Saturdays and Sundays* are defined as the time period between 12:01 am Saturday and 12:01 am Sunday, and between 12:01 am Sunday and 12:01 am Monday local time respectively.

*Holiday* hours are defined as the 24 hour period beginning at 12:00 midnight local time on the day of the holiday.

172

173 **B.2.5 Attended Services (Dedicated Solution) - Information Specialist (IS) Hourly**  
 174 **Rate**

175 This is the fully burdened fixed unit rate to be paid for each IS hour worked. The hourly rate  
 176 includes the blended labor costs of IS and relevant support personnel (e.g., quality  
 177 monitoring personnel, trainers, human resources personnel, etc.) required to meet task  
 178 requirements. Separate rates are provided for normal business hours, nights, Saturdays and  
 179 Sundays, and federal holidays (see Section B.2.1.2.2 for definitions).

180

181

182 **B.2.6 QA Personnel Multiplier**

183 The QA Personnel Multiplier is a factor to be applied to the IS and IS Supervisor hourly rate  
 184 to calculate the effective hourly rate for IS and IS Supervisors when task requirements  
 185 require the Contractor to provide a solution with IS to QA personnel ratio that is above or  
 186 below the average requirement. This multiplier is to be used only for dedicated solutions.

187

188 **B.2.7 Shared or Non-Dedicated Telephone Inquiry Response Solution - Information**  
 189 **Specialist (IS) Hourly Rate**

190 The charges are based on the actual handle time required for Information Specialists to  
 191 respond to telephone inquiries using prepared scripts/response provided by the Government.  
 192 The fixed unit rate reflects the fully burdened unit rate for work performed by an IS plus any  
 193 support personnel (e.g., program and project management, supervisors, quality monitoring  
 194 personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and  
 195 maintenance required to support the IS in the performance of task requirements for a specific  
 196 daily work volume commitment. For billing purposes, the actual handle time (including  
 197 wrap-up time) of all calls during the month shall be totaled and rounded up to the nearest  
 198 hour. The call handle time shall not include time spent waiting in queue or listening to  
 199 automated messages.

200

201

202 **B.2.8 Shared or Non-Dedicated E-Mail Inquiry Response Solution - Information**  
 203 **Specialist (IS) Hourly Rate**

204 The charges are based on the actual handling time required for Information Specialists to  
 205 respond to e-mail inquiries using prepared scripts/response provided by the Government.  
 206 The fixed unit rate reflects the fully burdened unit rate for work performed by an IS plus any  
 207 support personnel (e.g., program and project management, supervisors, quality monitoring  
 208 personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and  
 209 maintenance required to support the IS in the performance of task requirements for a specific  
 210 daily work volume commitment. For billing purposes, the actual time expended by ISs in  
 211 responding to e-mail inquiries during the month in support of specific task requirements shall  
 212 be totaled and rounded up to the nearest hour.

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**B.2.1 Project Start-Up**  
**B.2.1.1 Base Facility and Equipment (For Each Center)**

**Table B.2.1.1-1 Base Facility and Equipment - Fewer than 25 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
10000	Phone & TTY Services	Each								
10001	Phone, TTY, FAX & E-Mail Services	Each								
10002	Phone, TTY, FAX, E Mail, Web Chat Services	Each								
10003	Add Enhanced Quality Monitoring Solution	Each								

**Table B.2.1.1-2 Base Facility and Equipment - Between 25 - 50 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
11000	Phone & TTY Services									
11001	Phone, TTY, FAX & E-Mail Services									
11002	Phone, TTY, FAX, E Mail, Web Chat Services									
11003	Add Enhanced Quality Monitoring Solution									

**Table B.2.1.1-3 Base Facility and Equipment - Between 51 - 100 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
12000	Phone & TTY Services									
12001	Phone, TTY, FAX & E-Mail Services									
12002	Phone, TTY, FAX, E Mail, Web Chat Services									
12003	Add Enhanced Quality Monitoring Solution									

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**Table B.2.1.1-4 Base Facility and Equipment - Between 101 - 250 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
13000	Phone & TTY Services	Each								
13001	Phone, TTY, FAX & E-Mail Services	Each								
13002	Phone, TTY, FAX, E Mail, Web Chat Services	Each								
13003	Add Enhanced Quality Monitoring Solution	Each								

**Table B.2.1.1-5 Base Facility and Equipment - Over 250 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
14000	Phone & TTY Services	Each								
14001	Phone, TTY, FAX & E-Mail Services	Each								
14002	Phone, TTY, FAX, E Mail, Web Chat Services	Each								
14003	Add Enhanced Quality Monitoring Solution	Each								

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### B.2.1.2 Incremental Facility and Equipment (For Each Center)

**Table B.2.1.2-1 Incremental Facility and Equipment - Fewer than 25 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
20000	Phone & TTY Services									
20001	Phone, TTY, FAX & E-Mail Services									
20002	Phone, TTY, FAX, E-Mail, Web Chat Services									
20003	Add Enhanced Quality Monitoring Solution									

**Table B.2.1.2-2 Incremental Facility and Equipment - Between 25 - 50 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
21000	Phone & TTY Services									
21001	Phone, TTY, FAX & E-Mail Services									
21002	Phone, TTY, FAX, E-Mail, Web Chat Services									
21003	Add Enhanced Quality Monitoring Solution									

**Table B.2.1.2-3 Incremental Facility and Equipment - Between 51 - 100 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
22000	Phone & TTY Services									
22001	Phone, TTY, FAX & E-Mail Services									
22002	Phone, TTY, FAX, E-Mail, Web Chat Services									
22003	Add Enhanced Quality Monitoring Solution									

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**Table B.2.1.2-4 Incremental Facility and Equipment - Between 101 - 250 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
23000	Phone & TTY Services	Each								
23001	Phone, TTY, FAX & E-Mail Services	Each								
23002	Phone, TTY, FAX, E-Mail, Web Chat Services	Each								
23003	Add Enhanced Quality Monitoring Solution	Each								

**Table B.2.1.2-5 Incremental Facility and Equipment - Over 250 Equivalent Workstations**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
24000	Phone & TTY Services	Each								
24001	Phone, TTY, FAX & E-Mail Services	Each								
24002	Phone, TTY, FAX, E-Mail, Web Chat Services	Each								
24003	Add Enhanced Quality Monitoring Solution	Each								

**B.2.1.3 Initial/Special Training**

**B.2.1.3.1 Course Development and Training**

**Table B.2.1.3-1 Hourly Rate for Course Development and Training**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
30000	Level 1	Hour								
30001	Level 2	Hour								
30002	Level 3	Hour								
30003	Level 4	Hour								

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### B.2.1.3.2 Information Specialist (IS)/Supervisor Hourly Rate While In Training

Table B.2.1.3.2-1 Information Specialist (IS) Hourly Rate (In Training) - English - Normal Business Hours

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
31000	Level 1	Hour								
31001	Level 2	Hour								
31002	Level 3	Hour								
31003	Level 4	Hour								
31004	Level 5	Hour								

Table B.2.1.3.2-1a Information Specialist (IS) Hourly Rate (In Training) - English - Nights

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
31010	Level 1	Hour								
31011	Level 2	Hour								
31012	Level 3	Hour								
31013	Level 4	Hour								
31014	Level 5	Hour								

Table B.2.1.3.2-1b Information Specialist (IS) Hourly Rate (In Training) - English - Saturdays and Sundays

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
31020	Level 1	Hour								
31021	Level 2	Hour								
31022	Level 3	Hour								
31023	Level 4	Hour								
31024	Level 5	Hour								

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**Table B.2.1.3.2-1c Information Specialist (IS) Hourly Rate (In Training) - English - Holidays**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
31030	Level 1		1/2	3/4	5/6	7/8	9/10			
31031	Level 2									
31032	Level 3									
31033	Level 4									
31034	Level 5									

**Table B.2.1.3.2-2 Supervisory Information Specialist (IS) Hourly Rate (In Training) - English - Normal Business Hours**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
32000	Level 1		1/2	3/4	5/6	7/8	9/10			
32001	Level 2									
32002	Level 3									
32003	Level 4									
32004	Level 5									

**Table B.2.1.3.2-3 Supervisory Information Specialist (IS) Hourly Rate (In Training) - English - Nights**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
32010	Level 1		1/2	3/4	5/6	7/8	9/10			
32011	Level 2									
32012	Level 3									
32013	Level 4									
32014	Level 5									

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**Table B.2.1.3.2-2b Supervisory Information Specialist (IS) Hourly Rate (In Training) - English - Saturdays and Sundays**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1 1/2	Extended Period 2 3/4	Extended Period 3 5/6	Extended Period 4 7/8	Extended Period 5 9/10
32020	Level 1	Hour										
32021	Level 2	Hour										
32022	Level 3	Hour										
32023	Level 4	Hour										
32024	Level 5	Hour										

**Table B.2.1.3.2-2c Supervisory Information Specialist (IS) Hourly Rate (In Training) - English - Holidays**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1 1/2	Extended Period 2 3/4	Extended Period 3 5/6	Extended Period 4 7/8	Extended Period 5 9/10
32030	Level 1	Hour										
32031	Level 2	Hour										
32032	Level 3	Hour										
32033	Level 4	Hour										
32034	Level 5	Hour										

**Table B.2.1.3.2-3 Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Normal Business Hours**

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1 1/2	Extended Period 2 3/4	Extended Period 3 5/6	Extended Period 4 7/8	Extended Period 5 9/10
33000	Level 1	Hour										
33001	Level 2	Hour										
33002	Level 3	Hour										
33003	Level 4	Hour										
33004	Level 5	Hour										

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Table B.2.1.3.2-3a Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Nights

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
33010	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
33011	Level 2	Hour								
33012	Level 3	Hour								
33013	Level 4	Hour								
33014	Level 5	Hour								

Table B.2.1.3.2-3b Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Saturdays and Sundays

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
33020	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
33021	Level 2	Hour								
33022	Level 3	Hour								
33023	Level 4	Hour								
33024	Level 5	Hour								

Table B.2.1.3.2-3c Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Holidays

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
33030	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
33031	Level 2	Hour								
33032	Level 3	Hour								
33033	Level 4	Hour								
33034	Level 5	Hour								

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**Table B.2.1.3.2-4 Supervisory Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Normal Business Hours**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
34000	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
34001	Level 2	Hour								
34002	Level 3	Hour								
34003	Level 4	Hour								
34004	Level 5	Hour								

**Table B.2.1.3.2-4a Supervisory Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Nights**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
34010	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
34011	Level 2	Hour								
34012	Level 3	Hour								
34013	Level 4	Hour								
34014	Level 5	Hour								

**Table B.2.1.3.2-4b Supervisory Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Saturdays and Sundays**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
34020	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
34021	Level 2	Hour								
34022	Level 3	Hour								
34023	Level 4	Hour								
34024	Level 5	Hour								

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Table B.2.1.3.2-4c Supervisory Information Specialist (IS) Hourly Rate (In Training) - Bi-Lingual - Holidays

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
34030	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
34031	Level 2	Hour								
34032	Level 3	Hour								
34033	Level 4	Hour								
34034	Level 5	Hour								

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### B.2.1.3.3 Knowledge and Content Development

Table B.2.1.3.3 Knowledge and Content Development Charge

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
40000	Level 1	Hour								
40001	Level 2	Hour								
40002	Level 3	Hour								
40003	Level 4	Hour								

### B.2.1.3.4 Project Implementation Support

Table B.2.1.3.4 Project Implementation Support

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
50000	Site Management	Hour								
50001	Program Management	Hour								
50002	Technology Management	Hour								
50003	Information Systems Security	Hour								
50004	Content and Knowledge Management	Hour								
50005	Contact/Case Management	Hour								
50006	Relationship Management	Hour								
50007	Customer Satisfaction Survey	Hour								

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## B.2.2 Project Management

**Table B.2.2-1**

CLIN	Service Description	Unit Of Issue	Base Period	Option Period	Option Period	Option Period	Option Period	Extended	Extended
60000	Level 1	Each Month							
60001	Level 2	Each Month							
60002	Level 3	Each Month							
60003	Level 4	Each Month							

### Table B.2.2-2 Incremental Project Management Support (Monthly)

CLIN	Service Description	Unit Of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
61000	Site Management	Hour								
61001	Program Management	Hour								
61002	Technology Management	Hour								
61003	Information Systems Security	Hour								
61004	Content and Knowledge Management	Hour								
61005	Contact/Case Management	Hour								
61006	Relationship Management	Hour								
61007	Customer Satisfaction Survey	Hour								

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### B.2.3 One-time Charges for Telecommunicated Services, Automated Services and Other Support Services

Table B.2.3-1

Service Initiation Change Order Charges for Telecommunications Services									
CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2
70000	Toll-Free Number	Each	1/2	3/4	5/6	7/8	9/10	Extended Period 1	Extended Period 2
70001	Access Termination	Each T-1 Termination							
70002	Access Termination	Each T-3 Termination							

Table B.2.3-2

Service Initiation/Change Order Charges for Telecommunications Services									
CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2
71000	Interactive Voice Response (IVR) Service	Hour							
71001	Voice/Speed Recognition	Hour							
71002	Text-to-Speech	Hour							
71003	Fax-Back/Fax-on-Demand	Hour							
71004	Voice Mail	each voice mail box							
71005	Automated Callback	Each							
71006	Web Callback	Each							
71007	Automated Outbound Dialing Campaign	Each							
71008	Automated Facsimile Service	Each							
71009	Automated E-mail Delivery	Each							
71010	Hosted On Line Ordering	Hour							
71011	Hosted Web Form	Hour							
71012	Hosted FAQ Service	Each Database or Group of Database							
71013	Hosted Web Chat	Hour							



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Table B.2.3-3 Service Initiation/Change Order Charges - Other Support Services

CLIN	Service Description	Unit of Issue	Base Period Yr 1/2	Option Period 1 Yr 3/4	Option Period 2 Yr 5/6	Option Period 3 Yr 7/8	Option Period 4 Yr 9/10	Extended Period 1	Extended Period 2	Extended Period 3
72000	Language Translation Services	Each								
72001	Transcription Services	Each								
72002	Fulfillment Services	Hour								

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**B.2.4 Recurring Charges for Telecommunicated Services, Automated Services and Other Support Services**

**Table B.2.4-1**

Recurring Charges for Telecommunications Services										
CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
80000	Toll-Free Number		1/2	3/4	5/6	7/8	9/10			
80001	Toll-Free Telephone Service									
80002	Long-Distance Telephone Service									

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Table B.2.4-2

Recurring Charges for Automated Services		Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
CLIN	Service Description									
81000	IVR Service									
81001	Voice/Speech Recognition									
81002	Text-to-Speech									
81003	Fax-Back/Fax-on-Demand									
81004	Voice Mail									
81005	Automated Callback									
81006	Web Callback									
81007	Automated Outbound Dialing Campaign									
81008	Automated Fax Delivery									
81009	Automated E-Mail Delivery									
81010	Hosted On Line Ordering									
81011	Hosted Web Form									
81012	Hosted FAQ Service - Less than 200,000 page views per month									
81012a	Hosted FAQ Service - Between 200K to 500K page views per month									
81012b	Hosted FAQ Service - Between 500K to 1,000K page views per month									
81012c	Hosted FAQ Service - Between 1,000K to 1,500K page views per month									
81012d	Hosted FAQ Service - Over 1,500K page views per month									
81013	Hosted Web Chat									

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Table B.2.4.2

## Recurring Charges - Other Support Services

CLIN	Service Description	Unit of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
82000	Transcription Service		1/2	2/4	3/5	4/6	5/7			
82001	Fulfillment Services									
82002	Language Translation Service - Telephone									
82003	Language Translation Service - Written									

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## B.2.5 Attended Services (Dedicated Solution) - Information Specialist (IS) Hourly Rate

Table B.2.5.1-1 IS Hourly Rate - Normal Business Hours (English)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
90001	Level 1		1/2	3/4	5/6	7/8	9/10			
90002	Level 2									
90003	Level 3									
90004	Level 4									
90005	Level 5									

Table B.2.5.1-2 IS Hourly Rate - Normal Business Hours (Bi-Lingual)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
90011	Level 1		1/2	3/4	5/6	7/8	9/10			
90012	Level 2									
90013	Level 3									
90014	Level 4									
90015	Level 5									

Table B.2.5.2-1 Supervisory IS Hourly Rate - Normal Business Hours (English)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
91001	Level 1		1/2	3/4	5/6	7/8	9/10			
91002	Level 2									
91003	Level 3									
91004	Level 4									
91005	Level 5									

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**Table B.2.5.2-2 Supervisory IS Hourly Rate - Normal Business Hours (Bi-Lingual)**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
91011	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
91012	Level 2	Hour								
91013	Level 3	Hour								
91014	Level 4	Hour								
91015	Level 5	Hour								

**Table B.2.5.3-1 IS Hourly Rate - Nights (English)**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
92001	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
92002	Level 2	Hour								
92003	Level 3	Hour								
92004	Level 4	Hour								
92005	Level 5	Hour								

**Table B.2.5.3-2 IS Hourly Rate - Nights (Bi-Lingual)**

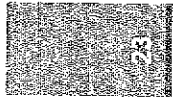
CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
92011	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
92012	Level 2	Hour								
92013	Level 3	Hour								
92014	Level 4	Hour								
92015	Level 5	Hour								

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Table B.2.5.4-1 Supervisory IS Hourly Rate - Nights (English)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
93001	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
93002	Level 2	Hour								
93003	Level 3	Hour								
93004	Level 4	Hour								
93005	Level 5	Hour								

Table B.2.5.4-2 Supervisory IS Hourly Rate - Nights (Bi-Lingual)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
93011	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
93012	Level 2	Hour								
93013	Level 3	Hour								
93014	Level 4	Hour								
93015	Level 5	Hour								

Table B.2.5.5-1 IS Hourly Rate - Saturdays and Sundays (English)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
94001	Level 1	Hour								
94002	Level 2	Hour								
94003	Level 3	Hour								
94004	Level 4	Hour								
94005	Level 5	Hour								

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Table B.2.5.5-2 IS Hourly Rate - Saturdays and Sundays (Bi-Lingual)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
94011	Level 1	Hour								
94012	Level 2	Hour								
94013	Level 3	Hour								
94014	Level 4	Hour								
94015	Level 5	Hour								

Table B.2.5.6-1 Supervisory IS Hourly Rate - Saturdays and Sundays (English)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
95001	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
95002	Level 2	Hour								
95003	Level 3	Hour								
95004	Level 4	Hour								
95005	Level 5	Hour								

Table B.2.5.6-2 Supervisory IS Hourly Rate - Saturdays and Sundays (Bi-Lingual)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
95011	Level 1	Hour	1/2	3/4	5/6	7/8	9/10			
95012	Level 2	Hour								
95013	Level 3	Hour								
95014	Level 4	Hour								
95015	Level 5	Hour								

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Table B.2.5.7-1 IS Hourly Rate - Holiday (English)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3	Extended Period 4
96001	Level 1	Hour	1/2	3/4	5/6	7/8	9/10	Extended Period 1	Extended Period 2	Extended Period 3	Extended Period 4
96002	Level 2	Hour									
96003	Level 3	Hour									
96004	Level 4	Hour									
96005	Level 5	Hour									

Table B.2.5.7-2 IS Hourly Rate - Holiday (BI-Lingual)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3	Extended Period 4
96011	Level 1	Hour	1/2	3/4	5/6	7/8	9/10	Extended Period 1	Extended Period 2	Extended Period 3	Extended Period 4
96012	Level 2	Hour									
96013	Level 3	Hour									
96014	Level 4	Hour									
96015	Level 5	Hour									

Table B.2.5.8-1 Supervisory IS Hourly Rate - Holiday (English)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3	Extended Period 4
97001	Level 1	Hour	1/2	3/4	5/6	7/8	9/10	Extended Period 1	Extended Period 2	Extended Period 3	Extended Period 4
97002	Level 2	Hour									
97003	Level 3	Hour									
97004	Level 4	Hour									
97005	Level 5	Hour									

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Table B.2.5.8-2 Supervisory IS Hourly Rate - Holiday (Bi-Lingual)

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended
97011	Level 1	Hour	1/2	0.4	0.56	0.78	0.98		
97012	Level 2	Hour							
97013	Level 3	Hour							
97014	Level 4	Hour							
97015	Level 5	Hour							

**B.2.6 QA Personnel Multiplier**

Table B.2.6 QA Personnel Multiplier

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended
98001	Low	X Factor							
98002	Average	X Factor							
98003	High	X Factor							

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**B.2.7 Shared or Non-Dedicated Telephone Inquiry Response Solution - Information Specialist (IS) Hourly Rate**

**Table B.2.7-1 IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - English (Normal Business Hours))**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
99001	4 Hours/Day		1/2	3/4	5/6	7/8	9/10	Extended	Extended	Extended
99002	8 Hours/Day									
99003	12 Hours/Day									
99004	24 Hours/Day									
99005	48 Hours/Day									
99006	96 Hours/Day									
99007	192 Hours/Day									
99008	384 Hours/Day									
99009	576 Hours/Day									

**Table B.2.7-1a IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - English (Nights))**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended	Extended	Extended
99011	4 Hours/Day		1/2	3/4	5/6	7/8	9/10	Extended	Extended	Extended
99012	8 Hours/Day									
99013	12 Hours/Day									
99014	24 Hours/Day									
99015	48 Hours/Day									
99016	96 Hours/Day									
99017	192 Hours/Day									
99018	384 Hours/Day									
99019	576 Hours/Day									

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**Table B.2.7-1b IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - English (Saturdays and Sundays))**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1 Yr	Extended Period 2 Yr	Extended Period 3 Yr	Extended Period 4 Yr
99021	4 Hours/Day		1/2	3/4	5/6	7/8	9/10				
99022	8 Hours/Day										
99023	12 Hours/Day										
99024	24 Hours/Day										
99025	48 Hours/Day										
99026	96 Hours/Day										
99027	192 Hours/Day										
99028	384 Hours/Day										
99029	576 Hours/Day										

**Table B.2.7-1c IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - English (Holidays))**

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1 Yr	Extended Period 2 Yr	Extended Period 3 Yr	Extended Period 4 Yr
99031	4 Hours/Day		1/2	3/4	5/6	7/8	9/10				
99032	8 Hours/Day										
99033	12 Hours/Day										
99034	24 Hours/Day										
99035	48 Hours/Day										
99036	96 Hours/Day										
99037	192 Hours/Day										
99038	384 Hours/Day										
99039	576 Hours/Day										

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Table B.2.7-2 IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - Bi-Lingual (Normal Business Hours))

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1 Yr	Extended Period 2 Yr	Extended Period 3 Yr	Extended Period 4 Yr
99041	4 Hours/Day		1/2	3/4	5/6	7/8	9/10				
99042	8 Hours/Day										
99043	12 Hours/Day										
99044	24 Hours/Day										
99045	48 Hours/Day										
99046	96 Hours/Day										
99047	192 Hours/Day										
99048	384 Hours/Day										
99049	576 Hours/Day										

Table B.2.7-2a IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - Bi-Lingual (Nights))

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1 Yr	Extended Period 2 Yr	Extended Period 3 Yr	Extended Period 4 Yr
99051	4 Hours/Day		1/2	3/4	5/6	7/8	9/10				
99052	8 Hours/Day										
99053	12 Hours/Day										
99054	24 Hours/Day										
99055	48 Hours/Day										
99056	96 Hours/Day										
99057	192 Hours/Day										
99058	384 Hours/Day										
99059	576 Hours/Day										

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Table B.2.7-2b IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - Bi-Lingual (Saturdays and Sundays))

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
99061	4 Hours/Day		1/2	3/4	5/6	7/8	9/10			
99062	8 Hours/Day									
99063	12 Hours/Day									
99064	24 Hours/Day									
99065	48 Hours/Day									
99066	96 Hours/Day									
99067	192 Hours/Day									
99068	384 Hours/Day									
99069	576 Hours/Day									

Table B.2.7-2c IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution - Bi-Lingual (Holidays))

CLIN	Service Description	Unit Of Issue	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2	Extended Period 3
99071	4 Hours/Day		1/2	3/4	5/6	7/8	9/10			
99072	8 Hours/Day									
99073	12 Hours/Day									
99074	24 Hours/Day									
99075	48 Hours/Day									
99076	96 Hours/Day									
99077	192 Hours/Day									
99078	384 Hours/Day									
99079	576 Hours/Day									

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USA Contact  
Response to RFP No. GSV07PD00003

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## B.2.8 Shared or Non-Dedicated E-Mail Inquiry Response Solution - Information Specialist (IS) Hourly Rate

Table B.2.8-1 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution - English

CLIN	Service Description	Unit of Measure	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended Period 1	Extended Period 2
99101	4 Hours/Day		12	3/4	5/6	7/8	9/10	Extended	Extended
99102	8 Hours/Day								
99103	12 Hours/Day								
99104	24 Hours/Day								
99105	48 Hours/Day								
99106	96 Hours/Day								
99107	192 Hours/Day								
99108	384 Hours/Day								
99109	576 Hours/Day								

Table B.2.8-1 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution - Bi-Lingual

CLIN	Service Description	Unit of Measure	Base Period Yr	Option Period 1 Yr	Option Period 2 Yr	Option Period 3 Yr	Option Period 4 Yr	Extended
99201	4 Hours/Day		12	3/4	5/6	7/8	9/10	Extended
99202	8 Hours/Day							
99203	12 Hours/Day							
99204	24 Hours/Day							
99205	48 Hours/Day							
99206	96 Hours/Day							
99207	192 Hours/Day							
99208	384 Hours/Day							
99209	576 Hours/Day							

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## Section C

### PERFORMANCE WORK STATEMENT (PWS)

#### **C.1 OVERVIEW**

##### **C.1.1 Background**

The General Services Administration (GSA) is responsible for implementing the USA Services E-Gov initiative. The USA Services initiative is one of the current Administration's 24 E-Gov initiatives designed to improve the delivery of Government information and services to the American public. In support of the initiative, GSA awarded indefinite delivery, indefinite quantity contracts to five different awardees in July 2004. These contracts are managed as the FirstContact program. As such, they are commonly referred to as the FirstContact contracts. The objective of the FirstContact program was to provide a qualified source of suppliers of contact center and related services to enable Federal agencies to obtain support to serve their customers on a timely and cost effective basis. The performance period of these contracts was one base year with four one year options. The total value of task orders that can be issued under these contracts was set at \$150 million. Although the expiration of the last option year is not scheduled until July 2009, GSA expects to exhaust the \$150 million contract ceiling by September 2007 or earlier. The purpose of this procurement action is to provide a qualified source of suppliers of contact center and related services to enable current FirstContact customer agencies to recompetes their requirements with the new suppliers at or before the end of their current task orders, and to meet new agency requirements. However, the Government makes no commitment that any of the existing customers of the FirstContact contracts will consider the use of the new contracts awarded under this procurement prior to the expiration of their task orders under the FirstContact contracts.

##### **C.1.2 Scope of Work**

This Statement of Work (SOW) provides a baseline of both general and specific requirements that the Contractor will be expected to accomplish to meet the needs of the Government.

The Contractor shall provide a wide range of automated and manual customer support services to respond to inquiries about Federal Government programs, policies, information sources and agencies from the general public, Congressional offices, business and professional communities, academia, Government offices, and electronic and print media. The Contractor shall furnish the necessary facilities, personnel, equipment, supplies, and services, as required, to meet the requirements of the Government. In addition to providing customer support services, the Contractor shall perform all technical and management functions, as described in this SOW, to plan, design, implement, operate, and manage the contact center solutions. The Contractor shall also provide any special project support needed to analyze, plan, design, implement, operate and manage special customer support services that may be needed to meet the diverse needs of the Government.

The geographic scope of this solicitation encompasses primarily contact centers that will be located in the United States. Where appropriate and on a task order-by-task order basis, the Government may allow centers to be located outside of the United States. The Contractor shall respond to inquiries and fulfillment requests originated from within the United States and from foreign countries.

The term "multi-channel contact center," as used in this solicitation, refers to a customer contact center that performs all functions associated with receiving and responding to inquiries, and providing information and services through the use of various communications media, including telephones,

telecommunications devices for the deaf (TDD/TTY), e-mail, postal mail, facsimile, the Internet, and other media as appropriate.

### **C.1.3 Objectives**

Through the services offered under this contract, the Government expects to realize the following objectives:

- Position the Government's public information services on par with or exceeding private industry standards by providing customers with easily accessible, accurate, timely, and professional responses to their inquiries via their preferred method of communication.
- Provide capability to respond quickly to provide fully managed multi-channel inquiry response and management solutions to meet the needs of Federal agencies and programs in emergency and crisis situations.
- Provide increased capability to measure and control the delivery of information services to meet the evolving needs of citizens.
- Provide solutions that comply with federal information systems security requirements.
- Gain and sustain access to commercial off-the-shelf, state-of-the-art technology that is secure and scalable to meet current and future requirements.
- Control information dissemination costs.
- Promote job opportunities for individuals who are blind or with severe disability.

## **C.2 PROGRAM REQUIREMENTS**

### **C.2.1 General Requirements**

#### **C.2.1.1 Contact Center Location**

Unless approved by the Government, all Contractor-provided, operated, and managed contact centers shall be located within the United States. For location-specific applications where it is not practical or economical to locate the center(s) within the United States, the Government may allow the Contractor to deviate from such requirement. Any such deviation must be approved by the Contracting Officer in advance of such placement.

#### **C.2.1.2 Hours of Operation**

Due to the diversity of agency requirements, the Contractor must have the capability to provide attended (live) service on a 24 hours a day, 7 days a week (24 x 7) basis. The Contractor shall provide separate rates for Normal Business Hours, Nights, Saturdays and Sundays, and Holidays, as defined below for attended services.

Normal Business Hours are defined as the time period between 7:00 am to 9:00 pm local time, Monday through Friday, except designated federal holidays.

Nights are defined as the time period between 12:01 am and 7:00 am local time on Monday, between 9:00 pm and 7:00 am local time, Monday through Friday, and between 9:00 pm Friday and 12:01 am local time Saturday, except on designated federal holidays.

Saturdays and Sundays are defined as the time period between 12:01 am Saturday and 12:01 am Sunday, and between 12:01 am Sunday and 12:01 am Monday local time respectively.

Holiday hours are defined as the 24 hour period beginning at 12:00 midnight on the day of the holiday.

Specific operating hours, including coverage for normal business hours, nights, Saturdays and Sundays, and holidays, and emergency notification requirements, if any, will be determined on a case-by-case basis and be included in task orders issued by the Government.

An automated service (e.g., Interactive Voice Response [IVR] or equivalent) shall be used to provide unattended service 24 hours a day, seven days a week. The Contractor shall provide options that allow the Government to select the automated service either from the Contractor or from any service providers under the General Services Administration Federal Government Long Distance Carrier or other Government contracts (e.g. Verizon, Sprint, Qwest, AT&T), or both.

#### **C.2.1.3 Place of Performance**

All inquiry response work shall be performed at contractor managed facilities within the United States unless specifically authorized by the Government.

#### **C.2.1.4 Work Types**

Due to the diversity of agency requirements, the Contractor must have the capability to support a wide range of customer support work types for all communications channels (e.g. telephone, e-mail, facsimile, postal mail, web chat), including but not limited to the types of inquiries listed below. Specific work types will be identified in task orders issued by the Government.

- Referrals
- General information inquiries
- Inquiries on specific programs, applications, and services
- Fulfillment requests
- Order intakes
- Congressional inquiries
- Emergency inquiries
- Contingency-related inquiries (e.g., inquiries resulting from the activation of an agency's Contingency Of Operations Plan [COOP])
- Service inquiries
- Scheduling of appointments
- Complaint inquiries
- Public comments
- Customer surveys/feedback

- Transcription services
- Information delivery/collection via outbound service
- Eligibility screening
- Inquiries on news and current events

#### **C.2.1.5 Language Support**

The Contractor must have the capability to support a wide range of languages in responding to live inquiries under various workload conditions, including but not limited to the languages listed below. Specific languages and volumes will be identified in task orders issued by the Government. The Contractor may provide foreign language support via "foreign language line" instead of on-site support if such is the most effective solution.

- English
- Spanish
- Mandarin
- Cantonese
- French
- German
- Japanese
- Korean
- Vietnamese

#### **C.2.1.6 Rapid Ramp-Up/Ramp-Down**

The Contractor must have the capability to ramp-up contact center operation to fully operational status within forty-eight (48) hours or sooner after task order award in response to crisis and emergency situations. This means that the contractor must have the facility, technology, and staffing in place to start taking calls within 48 hours of task award. The 48 hour ramp-up requirement is for tasks requiring support of up to 250 seats. This includes the provision of required equipment and facilities, trained staff, telecommunications and automated response solutions, possible round-the-clock attended coverage, and management reports on inquiry activities. The Contractor must ramp-down to the desired staffing level within 24 hours of notification by the Government or within the minimum notification period for terminating employment set forth in employment law, whichever is longer.

#### **C.2.1.7 Dedicated and Shared or Non-Dedicated Service Solutions**

The Contractor must have the capability to provide dedicated and shared or non-dedicated service solutions in response to specific Government requirements. A dedicate solution is defined as a solution that utilizes work space, equipment, and staffing which are dedicated to the project. A shared or non-dedicated solution is defined as a solution that utilizes work space, equipment, and staffing which are shared with other projects managed by the contractor or its subcontractors. The Contractor is required to provide dedicated solutions to support all project complexity and skill levels within the timeframe specified in individual task orders. The Contractor is required to provide shared or non-dedicated service solutions to support less complex projects that require short ramp-up time and lower skill levels.

The Contractor shall provide shared or non-dedicated service solutions to respond to telephone and e-mail inquiries. At a minimum, shared or non-dedicated telephone inquiry response solutions shall respond to seventy (70) percent of all calls within twenty (20) seconds after the calls are offered to the Information Specialists at an abandonment rate of three (3) percent or less. Shared or non-dedicated e-mail inquiry response solutions shall respond to eighty (80) percent of all e-mail inquiries within two (2) business days of receipt.

## **C.2.2 Sample Workflow**

The following sample workflow descriptions are provided for illustrative purposes only. Actual workflow will be described in individual task orders. The Contractor shall have the capability to accommodate workflow requirements of varying complexity. The Contractor shall develop the optimum workflow based on requirements and business rules as identified in individual task order requirements and industry best practices, as applicable. The Government reserves the right to change the workflow requirements at any time after task order issuance to accommodate changes in program requirements on an as-needed basis.

### **C.2.2.1 Sample Call Flow**

A sample call flow process is provided below.

The caller dials a direct-dial or toll-free telephone number terminating at or routed to the Contractor provided contact center for Government information and assistance.

The call is delivered to an automated service (e.g., IVR or equivalent) furnished either by the Contractor or the Government. The automated service provides a menu of services that access answers to frequently asked questions and automated facsimile services. The automated service may also provide an option for the caller to be transferred automatically to another Government contact center for assistance. If the caller is unable to satisfy his or her inquiry via the self-service options offered by the automated service, or prefers to talk to a live Information Specialist (IS), the caller can, during normal business hours, select the option to speak to a live IS for assistance. If the call is received after normal business hours, the caller is informed of the business hours and asked to call back during those hours on the next business day, or to leave a message for a return call. If the call is of an emergency nature, the caller is provided with directions to call a designated telephone number for assistance.

After the caller is routed to an IS, the IS responds to the caller's initial request and any other additional requests the caller makes. The IS retrieves data from a knowledge base to respond to customer requests and/or records the required information needed to complete any fulfillment actions. The Contractor shall provide an inquiry tracking tool whereby the IS shall have the capability to initiate actions or check the status of previous actions initiated on behalf of the caller. When possible, all systems work shall be performed while the IS is engaged with the caller during the phone call.

The IS either completes the call or routes the call to more experienced Contractor personnel for further assistance. If information requested is beyond the scope of Contractor's agreed to level of service as specified in the task order, the IS refers the caller to the appropriate Government agency personnel for completion. Calls requiring transfer may be accomplished using blind or attended transfer as specified by the agency, or may be referred to the appropriate agency via e-mail or facsimile rather than via telephone transfer. In cases where the caller indicates an emergency situation, however, the Contractor personnel shall stay on the line with the caller (attended transfer) until a live person is reached. The caller has the option of making multiple requests during any one phone call. At call termination, the IS will perform after-call wrap-up procedures and logs necessary action items and call information.

The nature of the caller's request may require that information be sent to the caller. If the requested information is available and can be sent by facsimile, the IS shall complete the facsimile transmission. If printed information is requested, the IS will record the required information needed to complete the fulfillment action. The fulfillment action may be completed by the Contractor or by the Government.

The IS records caller/case profile information for the contact/case management system.

Complex requests may require one or more follow up calls by the IS. The IS shall have the capability to dispatch information to a caller through mail, e-mail, and facsimile. The Contractor-provided inquiry tracking tool shall monitor all requests that require follow up and automatically assign those requests to an IS for further action. Where follow up telephone contact is required, the system shall prompt the assigned IS to make such contact. The IS shall both resolve the issue and initiate the customer callback, or escalate the issue internally for resolution.

#### **C.2.2.2 E-Mail Workflow (Normal)**

A sample description of a normal e-mail workflow process is provided below.

The inquirer visits a Government web site (e.g., USA.gov's website @ [www.usa.gov](http://www.usa.gov)). If the inquirer cannot find what he or she is looking for, the web site provides alternatives for further assistance. One of the alternatives is a toll-free phone number to call for assistance. Another alternative is to access an automated tool or service from the website that provides answers to frequently asked questions (FAQs) (see Section C.3.1.11). If further assistance is needed, the inquirer can access an e-mail form on the website to send an inquiry on the desired subject. A variation of the web-based e-mail form alternative may be to allow the inquirer to send an e-mail message directly to a published Government e-mail address.

If the inquirer elects to use the e-mail form alternative, an e-mail form at the website will provide helpful hints and frequently asked topics to guide the inquirer through the process of submitting the request and help focus the nature of the inquiry. The request is then forwarded to the contractor-provided contact center for response.

Upon receipt of the inquiry at the center, the Contractor-provided e-mail distribution and management system will time-stamp, sort, categorize, and prioritize the inquiry based on agency specified business rules, and assign a tracking number that will be used throughout the process to track the status of the inquiry. Upon receipt of the inquiry by the contractor's e-mail system, the Contractor may be asked to immediately forward a copy of the original inquiry to a Government-furnished e-mail address for informational purposes. The system will capture all relevant information about the inquiry and present it for use by the IS during the response process. As a first step in the response process, a Government approved auto-response will be sent immediately to the e-mail address provided by the inquirer to acknowledge receipt, provide the tracking number for any future communication, and provide an estimated response time. Over time, as the Contractor develops preformatted responses to frequently asked subjects, the Contractor may include preformatted responses as part of the auto-response.

After the initial acknowledgment, the inquiry will be routed to an IS with the appropriate skills for responding to the inquiry. Depending on the nature of the inquiry, the IS will either respond directly or will refer the inquiry to the appropriate contractor or agency personnel for direct response. If the IS decides to refer the inquiry to an agency (or agencies) for response, the IS will send a notice to inform the inquirer of this decision and to provide relevant information on the responding office(s), the expected response time as determined by the agency (if applicable), and contact information. The status log for

this inquiry will then be updated. In either case, the Government may require the Contractor to provide a copy of the response to a Government-furnished e-mail address for agency monitoring and quality control purposes.

Upon completion of the response to an e-mail message forwarded by the Contractor, the responding agency may send a completion notice to the Contractor contact center for status update. The completion notice may be in the form of a batch listing containing all referred e-mails handled by that agency organized by tracking number and including a date and time, or a cc or bcc copy of each e-mail response, which then can be used by the Contractor to close out the case. With consensus of all parties, an alternative method of updating the status can be used. The Contractor shall work with the agency to develop a method that meets the needs of both parties. If the responding agency elects, as part of its business rules, not to send a completion notice to the Contractor, the inquiry will be considered closed and no further action will be required.

#### **C.2.2.2.1 E-Mail Workflow (Misdirected)**

The Contractor may receive e-mail inquiries from other agency(ies) who have determined that they are not the appropriate agent for responding to these inquiries. One of the goals of the USA Services initiative is to reroute these misdirected inquiries to the appropriate agencies for direct response. These misdirected inquiries may be routed to the Contractor via a central forwarding mail box established by each agency or from one or more individual mail boxes. Once received, the inquiries are processed in a manner similar to that described in Section C.2.2.2. The Contractor shall work with the agencies to develop the appropriate protocols and procedures for responding to and managing the disposition status of the misdirected inquiries.

#### **C.2.2.2.2 E-Mail Response Options**

E-mail response options may vary from one agency to another. When responding to e-mail inquiries, the IS shall analyze the message content to determine the nature of each inquiry. The IS shall evaluate the available response options to determine which is the most appropriate for the inquiry and, if necessary, query the appropriate database(s) for relevant information to be included in the response, and then record aspects of the inquiry in a contact/case management status log. For example:

No response - If the inquiry does not require a response (some examples are pranks, spam, duplicate messages, and incomprehensible submissions), the IS records the type of message in the status log and notes that no further action is required.

Comment or opinion - If the inquiry is a comment or opinion not requiring a customized response, the IS forwards the inquiry to the appropriate agency and sends an acknowledgment to the inquirer thanking them for the input, and identifying agency to which it has been transmitted. The IS records the topic of the question using specific categories provided through the system for in reporting such data to agencies and updates the status log for this inquiry.

General inquiry easily answered - If the inquiry is general in nature and can be answered immediately, the IS produces the response using preformatted responses. The IS records the topic of the question using specific categories provided through the system for use in reporting to agencies and updates the status log for this inquiry.

Inquiry to be forwarded to a single agency - If the inquiry requires a customized response and must be forwarded to an agency, the IS forwards the inquiry to the appropriate agency. The IS also sends a response to inform the inquirer of this action as to what type of response time to expect, and how to follow up with the responding agency. The IS records the topic of the question using specific categories

provided through the system for reporting such data to agencies and updates the status log for this inquiry. Both the forwarding and response action are accomplished simultaneously with one automated action.

Inquiry to be forwarded to multiple agencies - If the inquiry requires a customized response and must be forwarded to more than one agency to receive a complete reply, the IS prompts the system to assign sub-level tracking numbers and forwards the inquiry to the appropriate agencies, notifying them which other agencies are also receiving the message. The IS also sends a response to inform the inquirer of this action, what type of response time to expect, and how to follow up with the responding agencies. The IS records the topic of the question(s) using specific categories provided through the system for use in reporting to agencies and updates the status log for this inquiry. Both the forwarding and response action are accomplished simultaneously with one automated action.

Inquiry to be referred to agency without e-mail - If the inquiry requires a customized response and must be forwarded to an agency, but there is no established contact at that agency, the IS provides the inquirer with an alternative means of communicating with the agency, such as the agency website URL, call center number, or mailing address. The IS records the need for follow up action to establish an appropriate contact at that agency and updates the status log for this inquiry.

Additional information required - If the IS determines that additional information from the inquirer is necessary to answer the question or to determine who can answer the question, the IS may use a preformatted or customized response to make a specific request for the additional information necessary to reply to the e-mail or to suggest that the inquirer call a toll-free number at a specified contact center to discuss the question. The IS records the topic of the question using specific categories provided through the system for use in reporting to agencies and updates the status log for this e-mail.

Referral to law enforcement for action - If the IS determines that the message is of a suspicious nature or contains a specific threat against life or property as defined by the agency, the Contractor shall escalate the matter to the appropriate authority. The Contractor will use established escalation procedures to ensure that the message is passed on to the appropriate law enforcement authorities within a pre-defined time interval.

Removal of extraneous data - To the extent practicable, the Contractor shall employ automated means to remove the extraneous routing and other data from the response (rather than relying on manual agent action).

Undeliverable responses - The Contractor shall track all undeliverable e-mail responses addressed to inquirers and perform analyses, as required, to determine the causes of non-delivery. If the IS determines that non-delivery was caused by an erroneous e-mail address, the Contractor shall make a reasonable attempt to identify and correct the error and to attempt redelivery of the message. The Contractor shall record any non-delivery in the case management database.

### **C.2.2.3 Facsimile Inquiry Workflow**

A sample workflow process for facsimile inquiries is provided below.

The inquirer sends an inquiry via facsimile to a direct-dial or toll-free telephone number for Government information and assistance. The Government may direct the contractor to respond to facsimile inquiries via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor-provided system receives the facsimile inquiry and, if necessary, converts and stores the facsimile inquiry in a commonly used format and distributes the inquiry to a qualified IS for response. The Contractor shall be responsible for tracking the status of facsimile



inquiries in a manner similar to e-mail inquiries. Facsimile inquiries referred to other federal agencies for direct response shall be transmitted as e-mail attachments. The Contractor shall note in the e-mail that the original inquiry was received as a fax document. Responses to facsimile inquiries may be via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor shall retain a copy of all responses for recordkeeping.

#### C.2.2.4 Postal Mail Inquiry Workflow

A sample workflow process for postal mail inquiries is provided below.

The inquirer sends an inquiry via postal mail to a specified postal address maintained by the Contractor or the Government. If the address is maintained by the Government, the mail will be forwarded to the Contractor using one or more of the following methods:

- forwarded by postal mail and/or courier service by the Government to an address maintained by the Contractor;
- picked up by the Contractor from a Government location; or
- converted documents forwarded to the Contractor by electronic means (e.g. e-mail, facsimile).

The Contractor receives the postal mail, assigns time and date of receipt to each inquiry, and, if required, converts each inquiry, including associated envelope/packaging, to a commonly used electronic format to facilitate routing, response, and records management. The inquiry is then routed to a qualified IS for response. The Contractor shall be responsible for tracking the status of postal mail inquiries in a manner similar to facsimile and e-mail inquiries. Postal mail inquiries referred to other federal agencies for direct response shall be scanned and transmitted as e-mail attachments. The Contractor shall note in the e-mail that the original inquiry was received via postal mail. Responses to postal mail inquiries may be via telephone, facsimile, e-mail, postal mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor shall retain a copy of the original inquiries and all responses for recordkeeping. Storage and disposition of originals and responses shall be in accordance with the requirements contained in individual task orders.

#### C.2.3 Response Protocols

The Contractor shall respond to information requests generally through the use of one or a combination of the following methods:

*Automated Response* – The Contractor shall use automated tools (e.g., IVR, Fax-on-Demand) to provide unattended service responded to frequently asked questions.

*Telephone response* - When responding to inquiries, the Contractor shall analyze the inquiry, assess the appropriate response modes, gather available information from all pertinent sources, analyze and confirm the accuracy of the information, and provide the requested information and/or assistance in the manner most efficient to satisfy the inquirer's needs. For inquiries involving more complex subjects that may require further research off line, the Contractor shall conduct the research in accordance with agency-provided guidelines and provide the appropriate information within the timeframe specified by the Government. Whenever possible, immediate responses shall be given.

*TDD/TTY response* – The Contractor shall ensure that TDD/TTY users are offered similar levels of service similar to that received by telephone users supported by this contract.

644 *Facsimile response* - In certain cases, the Contractor may be requested to provide to the inquirer written  
 645 documentation that supports the oral response given over the telephone and/or conveys the information  
 646 requested. When requested and where possible, the Contractor shall send a copy of the document to the  
 647 caller via facsimile within the timeframe specified by the Government. The Contractor shall employ  
 648 automated means of sending the requested documents. The Contractor shall use instructions provided by  
 649 the Government for handling facsimile responses.

650  
 651 *Electronic response* - The Contractor shall respond to requests received through electronic media (e.g., e-  
 652 mail, Internet websites, facsimile) within the timeframe specified by the Government. These responses  
 653 may require the Contractor to provide copies of any information source documents as attachments to the  
 654 electronic response. If the source documents are not available in electronic format, the Contractor may be  
 655 required to convert the documents to a suitable format to facilitate electronic transmission and records  
 656 management. The Contractor shall retain a copy of the electronic inquiry and response for recordkeeping  
 657 for a period specified by the Government.

658  
 659 *Written (postal mail) response* - The Contractor shall respond to written requests accurately and  
 660 completely within the timeframe specified by the Government. These responses may require the  
 661 Contractor to provide copies of any information source documents as attachments to the written response.  
 662 The Contractor may be required to convert the documents to a suitable format to facilitate routing,  
 663 response and records management. Response to written inquiries may be provided by telephone, e-mail,  
 664 facsimile, postal mail, or other communications media, whichever is more efficient and satisfies the  
 665 inquirer. The Contractor shall retain a copy of the written inquiry and response for record-keeping for a  
 666 period specified by the Government. For written inquiries where the Contractor is unable to decipher the  
 667 content of the request, Contractor shall, if possible, contact the customer by telephone or mail and attempt  
 668 to resolve the inquiry in the most expeditious fashion.

669  
 670 *Form letter response* - The Contractor may develop and prepare form letters for dissemination in  
 671 response to telephone, electronic, and written inquiries. The Government shall approve all such form  
 672 letters before they are used to fulfill information requests.

673  
 674 *Interim response* - In cases where the Contractor cannot provide an immediate response because further  
 675 research is necessary, the Contractor shall provide the requestor with an interim response within the  
 676 timeframe specified by the Government. The interim response shall indicate when the inquirer will  
 677 receive a complete response.

678  
 679 *Coordinated response* - Any inquiry, especially one involving legal matters, policy interpretation, and/or  
 680 a highly technical response that cannot be answered readily from approved materials in the knowledge  
 681 database shall be referred to the appropriate authority for direct response. Telephone inquiries of such  
 682 nature shall be forwarded immediately after identification. Electronic, facsimile and written inquiries  
 683 identified as requiring special support from appropriate authority shall be forwarded in the timeframe  
 684 specified by the Government, but no later than two (2) business days after receipt.

685  
 686 *Referral* - Some inquiries may be misdirected and/or not within the scope of the specific program  
 687 mission. The Contractor shall differentiate these inquiries and re-direct and refer inquiries that are  
 688 misdirected and/or not within the scope of the programs, to individuals or organizations that may be able  
 689 to provide answers to questions or otherwise offer assistance. When appropriate the Government will  
 690 provide the Contractor with a baseline referral list of such individuals and organizations on a program-by-  
 691 program basis. The Contractor shall maintain, expand, and update this list throughout the contract  
 692 performance period to ensure it is current and complete.

693

### 694 C.3 SERVICES TO BE PROVIDED

695  
696 The Contractor shall provide all of the services identified in this SOW. Specific service requirements will  
697 be identified on a case-by-case basis and be included in individual Task Orders to be issued by the  
698 Government. The Contractor shall ensure that services delivered employ technology that is effective and  
699 scalable to meet the evolving needs of the Government and adhere to business processes that conform to  
700 industry best practices.

701  
702 The Government reserves the right to add additional services required to meet the evolving needs of the  
703 citizens and agency programs at any time during the life of the contract. Any additions will be subject to  
704 written mutual agreement between the Government and Contractor.

#### 705 C.3.1 Automated Services

706  
707 The Contractor shall provide automated services to enable the Government to deliver unattended service  
708 24 hours a day, 7 days a week (24 x 7). The Contractor is responsible for the provision, maintenance,  
709 design, implementation, operation, and management of these services.

##### 710 C.3.1.1 Automated Voice Response Services

711  
712 Automated voice response services are intended to provide unattended service to telephone callers on a 24  
713 x 7 basis. These services include the traditional interactive voice response (IVR) service, which uses the  
714 telephone touch-tone pad or simple voice commands to access pre-recorded information. They also  
715 include advanced services that make use of speech recognition and text-to-speech technologies to enhance  
716 efficiency and customer service. At a minimum, the Contractor-provided automated voice response  
717 services shall support the following languages:

- 718 ○ Cantonese
- 719 ○ English
- 720 ○ French
- 721 ○ German
- 722 ○ Japanese
- 723 ○ Korean
- 724 ○ Mandarin
- 725 ○ Spanish
- 726 ○ Vietnamese

727  
728 Specific language support requirements will be identified in task orders issued by the Government.

729  
730 The Contractor shall provide qualified personnel to develop and regularly maintain call flow and  
731 messages for automated voice response services in keeping with the current informational needs of the  
732 callers. The Contractor shall ensure timely update of all messages in accordance with the turn-around  
733 timeframes established by the Government. Unless otherwise directed by the Government in individual  
734 task orders, Contractor shall post changes within 24 hours of receipt for all non-emergency information  
735 and within 2 hours of receipt for emergency notices. Support for emergency postings and updates is  
736 required on a 24 hour a day, 7 days a week basis. Updates of the script and/or the "call flow" may be  
737 made on demand and on an "as required" basis.

The Government may elect to furnish its own network-based automated voice response services, obtained from the Federal Government Long Distance Carrier or other contracts, as part of the toll-free telephone service requirement if the use of such service is determined to be in the best interest of the Government. The Government reserves the right to furnish these services at the outset of a project or to implement these services to augment or replace the contractor-provided services at any time during the effective contract period. In the event the Government elects to furnish its own automated voice response service, the Contractor shall provide qualified personnel to develop and maintain call flow and scripts for the Government furnished services as specified in Section C.3.5.6.a.

#### **C.3.1.1 .1 Interactive Voice Response (IVR) Service**

The IVR service shall accommodate callers having touch-tone and rotary telephones/dial pulse telephones who seek information via the unattended mode. All IVR messages shall be recorded using broadcast standard recording techniques, and any changes to the script will be made using the same voice pattern, at the same pitch, speed and tone of delivery, and at the same volume as the initial recordings. The IVR service shall provide options to allow the caller to return to the main menu and select live operator assistance during the normal business hours. The IVR solution shall provide access to information via Fax-Back/Fax-on-demand services, and other automated services, when such services are ordered and implemented as part of the IVR solution.

#### **C.3.1.1.2 Voice/Speech Recognition Service**

The Contractor shall provide voice recognition service to augment and/or replace the traditional IVR service. The service shall provide access to information via other automated services and/or live assistance as appropriate. The service shall provide an intuitive, convenient, customer-friendly, and naturally-sounding speech interface that serves callers quickly, efficiently, accurately, and consistently. The service shall automatically adapt to callers' language, speech patterns, accents, and noise environment to ensure accurate and responsive service. The service shall incorporate self-learning technology to enable recognition and response accuracy to continually improve as the service adapts to caller usage of the service. The service shall support VoiceXML and other industry standards for voice-driven applications.

#### **C.3.1.1.3 Text-to-Speech Service**

The Contractor shall provide text-to-speech service to augment and/or replace the traditional IVR service. The service shall convert textual information into speech that closely resembles natural voice over any telephone. The service shall provide an intuitive, convenient, customer friendly, and natural-sounding speech interface that serves callers quickly, efficiently, accurately, and consistently. The service shall be able to distinguish between homophones (words with identical spellings but different pronunciations) and understand word context as they appear in a sentence. The service shall provide word, phoneme, and bookmarks support. The service shall provide the capability for authorized personnel to update dictionaries remotely to improve accuracy. The caller shall not experience any noticeable latency during the processing of long text strings. The service shall support speech synthesis mark-up language (SSML) and other industry standards for text-to-speech applications.

#### **C.3.1.2 Facsimile Services**

The Contractor shall respond to requests for information via automated facsimile services, including Automatic Fax-Back and Fax-On-Demand services. Automatic Fax-Back allows a caller to select a document from a list via a self-service menu and direct the document to be sent to a specified fax number. Fax-On-Demand allows an Information Specialist to automatically fax a document requested by the caller to a specified fax number. Specific documents to be provided via facsimile services will be identified in individual task orders.

789

790 **C.3.1.2.1 Automatic Fax-Back Service**

91 The Contractor shall respond to requests for information via automated Fax-Back immediately upon  
 792 receipt of such requests. The Contractor shall integrate the automated Fax-Back service with its IVR  
 793 and/or other automated voice response services to enable the caller to select the requested information,  
 794 and to enter a fax number for receiving the information without the assistance of an Information  
 795 Specialist. The selection menu for the automated Fax-Back service shall allow the caller to return to the  
 796 main menu and/or to allow the caller to access the Information Specialist for assistance.

797

798 **C.3.1.2.2 Fax-On-Demand Service**

799 When it is more efficient and cost effective to respond to inquiries (telephone, letter, e-mail, etc.) by  
 800 facsimile, the Contractor shall deliver the requested information via Fax-on-Demand service immediately  
 801 upon receipt of such requests. The Fax-On-Demand service shall allow the Information Specialist and/or  
 802 the caller to select the requested information and either request the information be sent immediately via  
 803 facsimile to the calling number during the same telephone session, or have the information sent to a  
 804 different fax number entered by the IS or caller. The Fax-on-Demand service shall be integrated with the  
 805 IVR and/or other automated service to enable the caller to access other services.

806

807 **C.3.1.3 Voice Mail Service**

808 The Contractor shall provide voice mail service to enable callers to leave suggestions, comments, callback  
 809 information, and messages on specific subjects. The voice mail service shall be accessible from the IVR  
 810 and/or other automated services and provide sufficient capacity to handle anticipated call volume and call  
 811 duration as defined on individual Task Orders. The Contractor shall retrieve and act on the recorded  
 812 information in accordance with task order requirements. When required, the Contractor shall provide a  
 813 taped copy of voice mail messages recorded. The Contractor shall maintain a copy of the voice mail  
 14 messages for at least 90 days from the record date.

815

816 **C.3.1.4 Automated Callback (Telephone)**

817 The Contractor shall provide an automated callback service that allows a telephone caller the option of  
 818 leaving callback information for Contractor call-back at a later time, instead of waiting in queue for an  
 819 available Information Specialist. The service shall prompt the caller to provide the callback information  
 820 and provide an estimated callback time to the caller. The service shall automatically contact the caller at  
 821 the estimated callback time, and connect the caller to an available Information Specialist for assistance. If  
 822 the callback encounters a busy or no-answer condition, the service shall repeat the callback for up to 3  
 823 additional attempts within an appropriate time interval (as specified in individual task orders) before  
 824 aborting. If the callback encounters a voicemail or answering service, the service shall leave a brief  
 825 message indicating the purpose and time of the callback and instructions for calling back, if any, as  
 826 provided by the Government. For billing purposes, each group of six callback attempts encountering a  
 827 busy and/or no-answer condition will be counted as a completed call.

828

829 **C.3.1.5 Web Callback**

830 The Contractor shall provide a fully managed hosted web callback service to allow a visitor to a  
 831 Government website to access the service and leave callback information for the Contractor to call back at  
 832 a later time. The service shall prompt the caller to provide the callback information, including the subject  
 833 of the inquiry, and provide an estimated callback time to the caller. The service shall automatically  
 834 contact the caller at the estimated callback time and connect the caller to an available Information  
 835 Specialist for assistance. If the callback encounters a busy or no-answer condition, the service shall  
 836 repeat the call back for up to 3 additional attempts within an appropriate time interval as specified in

individual task orders before aborting. If the callback encounters a voice mail or answering service, the service shall leave a brief message indicating the purpose and time of the callback and instructions for calling back, if any, as provided by the Government. For billing purposes, each group of six callback attempts encountering a busy and/or no-answer condition will be counted as a completed call.

#### **C.3.1.6 Automated Outbound Dialing Campaign**

The Contractor shall provide a fully-automated solution to deliver a pre-recorded message furnished or specified by the Government to individuals/organizations on a listing provided by the Government. The service shall have the capacity to accommodate a message length of up to 90 seconds. The service shall automatically call the individuals at specified phone numbers for up to six attempts at time periods and intervals specified by the Government. Upon answer by an individual, voice-mail, or telephone answering equipment, the service shall deliver a pre-recorded message specified by the Government. If the service encounters a busy or no-answer condition, the service shall repeat the calling for up to 5 additional attempts before aborting. For billing purposes, each group of six (6) dialing attempts encountering a busy and/or no-answer condition will be counted as one (1) completed call.

#### **C.3.1.7 Automated Fax Delivery**

The Contractor shall provide a fully automated solution to transmit documents, via facsimile, to individuals/organizations on a listing provided by the Government. The service shall have the capacity to accommodate documents of up to 3 pages in length, excluding the cover page, for each transmission. The service shall automatically call the individuals at specified telephone numbers for up to six attempts at time periods and intervals specified by the Government. Upon answer by functional facsimile equipment, the service shall transmit the document specified by the Government. If the service encounters a busy or no-answer condition, the service shall redial the call for up to 5 additional attempts before aborting. For billing purposes, each group of six (6) callback attempts encountering a busy and/or no-answer condition will be counted as one (1) completed call.

#### **C.3.1.8 Automated E-Mail Delivery**

The Contractor shall provide a fully automated solution to transmit e-mail messages via the Internet to individuals/organizations on a listing provided by the Government. The service shall have the capacity to accommodate text messages of up to 15K bytes in length for each e-mail message. The contractor shall identify all unsuccessful transmission attempts and determine the cause of such failures. If the unsuccessful attempts were caused by contractor errors, the Contractor shall correct the errors and retransmit the message within 24 hours of the corrections.

#### **C.3.1.9 Hosted On-Line Ordering**

The Contractor shall provide a fully managed secure, scalable, hosted service to allow visitors to a Government and/or Contractor-provided website to access an on-line ordering service to order free and/or paid Government publications on a 24 x 7 basis. The ordering interface must be designed to accommodate multiple browsers, including at a minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of 1998. The service shall capture the required information and either provides the recorded information to the Government in electronic format, or uses the captured information to complete fulfillment requests.

#### **C.3.1.10 Hosted E-Mail Web Form**

The Contractor shall provide a fully managed hosted service to allow visitors to a Government website to access a contractor-developed and maintained web form for submitting e-mail inquiries to a designated e-

mail address. The web form interface must be designed to accommodate multiple browsers, including at minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of 1998. The web form shall allow users to associate the topics of their inquiries with a list of frequently requested topics identified by the Government. The service shall capture all relevant information regarding the inquiry for transmission to the designated e-mail system.

#### C.3.1.11 Hosted FAQ Service

Government agencies operate a large number of websites that are accessed by the general public for information. Increased public usage of these web sites has generated a substantial increase in the number of e-mail inquiries to which agencies must respond. To reduce the workload associated with processing e-mail inquiries and to provide better customer service, the Government requires a technology-based solution that will enable agencies to leverage previous good answers to frequently asked questions (FAQs) and provide the answers to their customers 24 x 7 via self-service using the Internet.

The Contractor shall provide a secure, highly available and scalable hosted solution to enable visitors to subscribing Government websites to access answers to FAQs on a 24 x 7 basis. The service must accommodate multiple browsers, including at minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of 1998. The service must be able to be implemented within 45 calendar days from the date of the service request and:

- Provide a user/administrator-friendly and intuitive interface that is easily configurable to match a website's look and feel.
- Allow the content of the FAQ knowledge base to be published to multiple web sites, each with a customizable "look and feel" for different audiences, or for multiple audiences on a single site.
- Support multiple languages, including at a minimum, English, Spanish, and Chinese.
- Meet federal information systems security requirements.
- Allow both browse and search of FAQs answers from a single or multiple knowledge bases by subject and response categories, with results automatically ranked by relevancy, usefulness, or other appropriate methods selected by the Government, including manual ranking to increase or decrease a particular FAQ's prominence relative to others.
- Have the capability for a user to submit an inquiry to either the Contractor or the subscribing agency for response. Allow Government and/or contractor personnel to review and/or respond to user inquiries in real time
- Have the capability to collect user feedback on the effectiveness, usefulness, and customer satisfaction of the service
- Allow users to subscribe to automatic notification of FAQ updates.
- Provide both remote and onsite access to authorized personnel to all administrative functions, as appropriate

- Store each FAQ and its corresponding answer as a separate record with a unique ID number; and allow information to be posted and modified in real time; enable each FAQ to be tagged with meta-data, which might include subject keywords, ownership, last updated date, expiration date, and other information.
- Display last update for each FAQ, if required.
- Allow content managers to automate content management tasks, which might include reviewing, archiving, and purging of data. Provides automatic notification on expiring or outdated content based on specified review schedule
- Be capable of presenting FAQs and their corresponding answers in a format that can be indexed by search engines (internal or external) without affecting performance metrics
- Search, select, and sort FAQ answers from within separate knowledge bases. Provide capability to select which knowledge bases will be included in each topic query
- Provide management reports on a scheduled or on-demand basis. Reports can be accessed via the web or by e-mail.
- Provide time/date stamping and user-friendly tracking numbers for all information requests. Allow multiple sub-tracking numbers to be assigned to a single request if required for internal or external purposes
- Include an automated query acknowledgement mechanism with a choice of customizable response messages.
- Have the capability to automatically verify the validity of internal and/or external links contained in the FAQ system on a daily basis and notifying the Contractor of any invalid links. The link verification process shall not disrupt availability of the hosted FAQ service to end users.

The Government intends to harvest some or all of the information contained in the Contractor's FAQ knowledge bases through the USAgov.gov search service or other agency search services on a regular basis. The Contractor shall allow these Government search services to access and retrieve relevant content of the FAQ knowledge bases and/or provide the capability to publish the data in Extensible Markup Language (XML) code to a designated Government or contractor system using standards and access/replication schedules that are mutually acceptable to the Contractor and Government.

#### **C.3.1.11.1 FAQ Guidelines**

The hosted FAQ service may be ordered with other Attended Services described in Section C.3.2 of this SOW or as a stand-alone service. If the Contractor is tasked to develop and administer the FAQ service, the Contractor shall conform to the following FAQ implementation guidelines:

- All answers to FAQ prepared by the Contractor shall be self contained and written in easy to read and understand language.
- All acronyms/abbreviations used and associated descriptions must be included within each answer
- URLs in all FAQ answers shall be written out in answer text (not embedded)



- 985 ○ Limit screen to 1 per answer (break content into usable chunks)
- 986 ○ Link to other answers rather than refer to a number or position on the page
- 987 ○ Last review/update date included with each answer
- 988 ○ Include an identification number for each FAQ
- 989 ○ Include identifiers for like FAQs (e.g., agency jurisdiction) for grouping and subsequent
- 990 extraction
- 991

## 992 **C.3.2 Attended Services**

993 The Contractor shall provide accurate, timely, complete, and courteous responses to all customer  
 994 inquiries. The Contractor shall provide qualified staff to support the work types identified in Section  
 995 C.2.1.4 of the SOW. The Contractor shall provide Attended Services via a dedicated solution or shared  
 996 or non-dedicated solution, as specified by the Government in individual task orders.

### 998 **C.3.2.1 Responding to Telephone Inquiries**

999 The Contractor shall provide all qualified staff and required equipment and services necessary to respond  
 1000 to telephone and TDD/TTY inquiries in accordance with performance parameters and instructions  
 1001 provided by the Government in individual task orders. The tasks to be performed include, but are not  
 1002 limited to, the following:

- 1003
- 1004 ○ Accurately responding to inquiries in a professional and courteous manner. These inquiries may
- 1005 be in the form of telephone and TDD/TTY calls. When necessary, transfer or referral the
- 1006 inquiries to the appropriate agency for response.
- 1007
- 1008 ○ Conducting research of Government-approved sources of information to prepare responses to
- 1009 inbound inquiries and developing appropriate responses accordingly.
- 1010
- 1011 ○ Capturing and tracking information related to inbound inquiries including date and time of
- 1012 receipt, nature of inquiry, source of inquiry if multiple telephone numbers are involved, customer
- 1013 identity when appropriate, information requested, disposition, response date, and any fulfillment
- 1014 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided
- 1015 case management tool.
- 1016
- 1017 ○ When necessary, forwarding recorded information via telephone, facsimile, or e-mail or other
- 1018 electronic transmission to the appropriate authority for further processing.
- 1019
- 1020 ○ Sending the requested information to a customer through the postal services, E-mail or facsimile,
- 1021 whichever is the most efficient delivery method and satisfies the customer.
- 1022
- 1023 ○ Recognizing new trends of inquiries for referral to management for development of common
- 1024 responses and reporting to the agency regarding sudden new lines of inquiry.
- 1025

### 1026 **C.3.2.2 Outbound Calling Services**

1027 The Contractor shall provide all qualified staff and required equipment and services necessary to perform  
 1028 outbound calling to selected customers in accordance with performance parameters and instructions  
 1029 provided by the Government in individual task orders. The tasks to be performed include, but are not  
 1030 limited to, the following:

1031

- Performing outbound callbacks in response to user requests for callback service.
- Performing outbound callbacks to selected customers in order to follow up on questions or issues that could not be resolved during the initial contact, to verify problem resolution, or to measure customer satisfaction as directed by the Government.
- Launching outbound calls to Government agencies for the purposes of relaying customer information, obtaining information in response to customer questions and/or issues that could not be resolved during the initial contact, or verifying problem resolution.
- Performing outbound calls in support of customer surveys, program and/or product promotions, product recalls, sales and marketing, and special events.
- Performing outbound calls in response to inquiries from callers using TDD/TTY devices.

### C.3.2.3 Responding to Postal Mail Inquiries

The Contractor shall provide all qualified staff, and required equipment, services, and supplies necessary to respond to written inquiries received via postal mail in accordance with business rules, guidelines, and performance parameters specified by the Government in individual task orders. The tasks to be performed include, but are not limited to:

- Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is more efficient and satisfies the inquirer. When necessary, sending the requested information to a customer through the postal services, E-mail or facsimile whichever is more efficient and satisfies the inquirer
- When requested by the Government, converting the inquiry documents to electronic format to facilitate routing, and response, and records management.
- Conducting research of Government-approved sources of information to prepare responses to written inquiries, and developing appropriate responses accordingly.
- Recording and tracking data/information related to the inquiries, including date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided case management tool.
- When necessary, forwarding the inquiries to the appropriate authority for further processing.
- Reviewing to ensure that outgoing responses are accurate and complete in accordance with business rules and guidelines established by the Government.

The Contractor shall respond to postal mail inquiries within the designated time frame specified by the Government. The Contractor shall collect and deliver written correspondence in accordance with the format, process, and procedures established by the Government. Unless otherwise directed by the Government, the written response may not identify the Contractor by name unless that is the subject of the inquiry. If the information needed for the response is not available within a designated time frame, the Contractor shall call the inquirer or send an interim response stating when a final response may be expected. A form letter is acceptable. The Contractor may elect to use a Government-approved pseudonym rather than the name of an employee as the signer of the letter.

#### 1082 C.3.2.4 Responding to E-Mail Inquiries

1083 The Contractor shall provide qualified staff and required equipment and services to respond to written  
 1084 inquiries received via e-mail. Responses shall be prepared in accordance with business rules, guidelines,  
 1085 and performance parameters specified by the Government in individual task orders. The tasks to be  
 1086 performed include, but are not limited to:

- 1087 ○ Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
- 1088 more efficient and satisfies the inquirer.
- 1089 ○ Conducting research of Government-approved sources of information to prepare responses to
- 1090 written inquiries, and developing appropriate responses accordingly.
- 1091 ○ Recording and tracking data/information related to the inquiries including date and time of
- 1092 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment
- 1093 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided
- 1094 case management tool.
- 1095 ○ When necessary, forwarding the inquiries to the appropriate authority for further processing.
- 1096 ○ Sending the requested information to a customer through the postal services, E-mail or facsimile,
- 1097 whichever is more efficient and satisfies the inquirer.
- 1098 ○ Reviewing to ensure that outgoing responses are accurate and complete in accordance with
- 1099 business rules and guidelines established by the Government. If the initial response is found to be
- 1100 erroneous by the Contractor and/or the Government and further action is needed to inform the
- 1101 inquirer, the Contractor shall send a corrected response to the inquirer immediately.

1102 The Contractor shall respond to e-mail inquiries within the designated time frame specified by the  
 1103 Government. The Contractor shall prepare the responses in accordance with business rules it has  
 1104 developed in conjunction with the Government, and/or with other guidelines provided by the  
 1105 Government. A preformatted response or telephone response, if such is the most efficient and satisfies  
 1106 the inquirer, is acceptable.

1107 The Contractor shall provide the required support to identify, record, and track the nature and volume of  
 1108 e-mail inquiries, and to measure the quality and timeliness of the response process from time of receipt to  
 1109 completed response. The Contractor shall accomplish this goal by tracking all incoming and outgoing e-  
 1110 mail messages and monitor the processing activities to determine the volume, nature and disposition of  
 1111 the inquiries. The Contractor shall benchmark the response process in its entirety to determine processing  
 1112 time of various types of e-mail inquiries and the skill sets required for responding to different types of  
 1113 inquiries and include the benchmark results in the requisite management reports. The Contractor shall  
 1114 monitor the performance of its personnel to ensure that productivity and quality standards, as specified in  
 1115 individual task orders, are met.

1116 The Contractor shall provide ongoing support to refine business rules and prepare preformatted responses  
 1117 for use in responding to public inquiries in the most efficient and effective manner. The Contractor shall  
 1118 retain a history of agency contacts, including agency name and address, contact name, address, phone  
 1119 number, fax number, e-mail address, agency web site URL(s), and dates of previous contacts and nature  
 1120 of communications, and updates the information regularly.

The Contractor shall utilize auto-filtering, auto-response, and auto-suggestions where appropriate to identify and populate appropriate e-mail responses to customers. The Contractor shall ensure that all outgoing e-mail responses are accurate and complete.

The Contractor shall on its own initiative recognize and quantify new lines of inquiry, sometimes developing suddenly in response to a recent social/political/news event, and prepare (with the support of the Government) appropriate responses. The Contractor shall quickly apprise the Government of any new topical trend in inquiries in a timely fashion.

If a direct response to an e-mail inquiry cannot be provided, the Contractor shall forward the e-mail message to the appropriate Federal agency(ies) for direct response based on guidelines provided by the Government. The Contractor shall maintain a system to track the status of all inquiries directed to other agencies for response, including updates on final disposition of inquiries.

### **C.3.2.5 Responding to Facsimile Inquiries**

The Contractor shall provide qualified staff and required equipment and services to respond to written inquiries received via facsimile. Responses shall be prepared in accordance with business rules, guidelines, and performance parameters specified by the Government in individual task orders. The tasks to be performed include, but are not limited to:

- Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is more efficient and satisfies the inquirer.
- Conducting research of Government-approved sources of information to prepare responses to facsimile inquiries, and developing appropriate responses accordingly.
- Recording and tracking data/information related to the inquiries, including date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided case management tool.
- When necessary, forwarding the inquiries to the appropriate authority for further processing.
- Sending the requested information to a customer through the postal services, E-mail or facsimile whichever is more efficient and satisfies the inquirer.
- Reviewing to ensure that outgoing responses are accurate and complete in accordance with business rules and guidelines established by the Government.

The Contractor shall respond to facsimile inquiries within the designated time frame specified by the Government in individual task orders. Unless otherwise directed by the Government, all facsimile inquiries shall be received and stored electronically to facilitate distribution and processing. The Contractor shall convert and store incoming facsimile inquiries to a commonly used electronic format to facilitate distribution and processing. Unless otherwise directed by the Government, facsimile inquiries referred to other federal agencies for direct response shall be transmitted as e-mail attachments. When referring the inquiry, the Contractor shall note in the e-mail that the original inquiry was received as a fax document. Responses to facsimile inquiries may be via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor shall retain a copy of all responses for recordkeeping. A preformatted or telephone response, if such is the most efficient and satisfies the inquirer, is acceptable.

The Contractor shall provide the required support to identify, record, and track the nature and volume of facsimile inquiries, and to measure the quality and timeliness of the response process from time of receipt to completed response. The Contractor shall accomplish this goal by tracking all incoming and outgoing facsimile messages and monitor the processing activities to determine volume, nature and disposition of the inquiries. The Contractor shall benchmark the response process in its entirety to determine processing time of various types of facsimile inquiries and the skill sets required for responding to different types of inquiries and include the benchmark results in the requisite management reports.

#### **C.3.2.6 Interactive Web-Based Services**

The Contractor shall provide qualified staff, equipment, software and services to support online interactive Internet-based services, such as web chat, using real-time text-based communication. The system supporting the chat service shall have the capabilities described in Section C.6.13 of this SOW.

#### **C.3.3 Other Support Services**

##### **C.3.3.1 Fulfillment Services**

Some Government agencies utilize fulfillment services provided by a Government entity, such as the Government Printing Office's Pueblo operations. However, there will be instances when an agency may require fulfillment services that can be performed more efficiently by the Contractor. When requested by the Government, the Contractor shall provide a complete fulfillment solution for purposes of providing customers with printed information. This information may be downloaded from sources including the Internet and/or other appropriate database applications (e.g., agency web site, Contractor-provided knowledge database). The tasks to be performed include, but are not limited to the following:

- Retrieving the document from appropriate sources and, if necessary, printing the document for distribution.
- Developing and/or implementing application(s) to track the print fulfillment status of all required records and files as specified.
- Ensuring that tracking information is recorded and made available upon request as part of the Contractor-provided case management tool.
- Ensuring the system can accept multiple requests from a customer made during any one phone call or written inquiry.
- Providing relevant documents to customers through the postal services, E-mail or facsimile, whichever is the most efficient and satisfies the inquirer.

The Contractor shall be responsible for supplying all printing equipment and supplies, mailing supplies, including envelopes and postage, and performing all fulfillment functions, such as addressing, insertion, and posting. The Government will provide the materials to be mailed or provide the sources where the materials can be obtained. Unless otherwise directed by the Government, all materials are to be sent via the least expensive class of U.S. Mail it can qualify for. Postage incurred by the Contractor for fulfillments will be reimbursed by the Government as Other Direct Charges (ODC).

**C.3.3.2 Transcription Service**

The Contractor shall provide qualified staff and equipment to transcribe messages recorded on voice mail and other recorded services. The Contractor shall perform transcription service on an as needed basis as specified in individual task orders (e.g., daily, weekly, monthly)

**C.3.3.3 Language Translation Services**

The Contractor shall provide language translation services on an as-needed basis to allow non-English speaking customers the ability to communicate their needs to the Government. This capability shall include, but not be limited to:

- Supporting over-the-phone, e-mail, and fax language translation capabilities.
- Supporting for multiple languages, including English and Spanish. (Note: Agency language requirements may be extensive and will vary widely from agency to agency. The specific languages to be supported by the Contractor will be identified in task orders issued by the Government.)
- Providing a data collection tool to evaluate the need and usage of language translation services.

**C.3.4 Directory Listing Services**

The Contractor shall arrange for the listing of public contact numbers (both voice and TTY) and website URLs to appear in selected telephone directories, as specified in task orders issued by the Government. The Contractor shall ensure that contact numbers and web site URL appear in the "U.S. Government" sections of the Blue or White Pages, as appropriate. The contact numbers and web site URL shall be in bold type where that is available.

The Contractor is hereby advised that GSA currently manages a Government-wide Blue Pages project to provide a more centralized and citizen friendly approach of listing Government agency telephone numbers in certain Blue and Yellow Pages directories. For those directories that are not covered under the Blue Pages project, the Contractor shall provide for the listing of the telephone number, the associated web site URL, and the location address of each agency that serves the area covered by the applicable Blue and Yellow Pages directories. The Contractor shall coordinate with designated Government representatives to avoid duplication of listing. The costs of these listing shall be borne by the Contractor. The Contractor shall report these costs to the Government for reimbursement as Other Direct Costs (ODC).

**C.3.5 Technical and Management Services**

The Contractor shall provide all required technical and management services as part of the citizen inquiry response and management solution. The functions to be performed include the following:

- Site Management
- Program Management
- Technology Management
- Information Systems Security Management
- Content and Knowledge Management
- Contact/Case Management

- 1275 ○ Relationship Management
- 1276 ○ Customer Satisfaction Survey

1277

1278 The above functions are further described in Sections C.3.5.2 through C.3.5.9 of this SOW. The  
 1279 Contractor shall provide a tiered pricing structure for providing technical and management services  
 1280 commensurate with the complexity of the requirements identified in task orders issued by the  
 1281 Government. The tiered structure shall include a core support component and an incremental support  
 1282 component.

1283

#### 1284 C.3.5.1 Core Project Management Support

1285 The core support component shall include, at a minimum, a project management staff (e.g., Contractor's  
 1286 Project Manager, site manager, technical personnel, human resources and quality assurance personnel,  
 1287 administrative personnel, content specialists, security personnel) and support services required to meet  
 1288 task requirements for a single site solution that involves information and information systems that are  
 1289 categorized as low impact in accordance with FIPS Publications 800-199, Standards for Security  
 1290 Categorization for Federal Information and Information Systems. The level of support required will be  
 1291 dependent on complexity of task requirements, as described below. For multi site solutions or more  
 1292 complex implementations and for information and information systems that are categorized as "moderate"  
 1293 or "high" impact, the Contractor may augment the core project management support with an incremental  
 1294 project management support component.

1295

1296 C.3.5.1.1 *Level 1* - encompasses tasks that involve work that is low complexity in scope. These tasks  
 1297 generally require the development and maintenance of simple scripts for automated voice response  
 1298 service and knowledge and/or customer databases. Training requirement of new employees is generally  
 1299 limited to 40 hours or less. Knowledge base and content development and maintenance, inquiry tracking  
 1300 and contact management, requirements are generally low. Reporting requirements are generally limited  
 1301 to system generated reports and periodic program summaries.

1302

1303 C.3.5.1.2 *Level 2* - encompasses tasks that involve work that is low to moderate complexity in scope.  
 1304 These tasks generally require the development and maintenance of moderately complex scripts for  
 1305 automated voice response service and knowledge and/or customer databases. Training requirement of  
 1306 new employees is generally limited to between 40 and 80 hours. Knowledge base and content  
 1307 development and maintenance, inquiry tracking and contact management, and reporting requirements are  
 1308 low to moderate.

1309

1310 C.3.5.1.3 *Level 3* - encompasses tasks that involve work that is high complexity in scope. These tasks  
 1311 generally require the development and maintenance of highly complex scripts for automated voice  
 1312 response service and knowledge and/or customer databases. Training requirement of new employees is  
 1313 generally between 80 to 120 hours. Knowledge base and content development and maintenance, inquiry  
 1314 tracking and contact management, and reporting requirements are high.

1315

1316 C.3.5.1.4 *Level 4* - encompasses tasks that involve work that is very high complexity in scope. These  
 1317 tasks generally require the recruitment and training of 100 or fewer new employees and the development  
 1318 and maintenance of extremely complex scripts for automated voice response service and knowledge  
 1319 and/or customer databases. Training requirement of new employees is generally between 120 to 160  
 1320 hours. Knowledge base and content development and maintenance, inquiry tracking and contact  
 1321 management, and reporting requirements are very high.

1322

**C.3.5.1.1 Incremental Support**

The Contractor shall provide incremental support to accommodate multi-site solutions and/or to support projects involving more complex implementations, and/or for projects that involve information and information systems that are categorized as "moderate" or "high" impact, and/or to support new requirements added subsequent to initial project implementation.

**C.3.5.2 Site Management**

The Contractor shall provide qualified personnel to manage and operate the contact center(s) to ensure optimum performance of systems and personnel. The Contractor shall analyze historical work volume, employee availability and schedule preferences, and trends to accurately forecast and schedule staffing resources to meet fluctuating workload requirements for all communications channels. The Contract shall employ proven best practices management approaches to ensure optimum utilization of available staffing resources to meet service objectives.

**C.3.5.3 Program Management**

The Contractor shall provide program management, oversight, and quality control of contact center services, systems, and components, including, but not limited to the following tasks:

**C.3.5.3.1 Project management** - Ensure the successful implementation, operation, and management of the inquiry response and management solution as prescribed in this Statement of Work and task orders issued by the Government.

**C.3.5.3.2 Oversight** - Serve as the single point of contact to: assist in engineering, planning, and administrative functions as needed to meet task order requirements; coordinate activities among Government offices, business partners, contractors, and other relevant organizations; resolve questions or issues related to hardware, software, communications, applications, and programs, including dispute resolution with service providers; escalate irresolvable technical issues to the appropriate Government official for final resolution; and develop resolution mechanisms to resolve technical issues and problems among contractors to minimize conflict and delay of services.

**C.3.5.3.3 Process Management** - Develop, document, and maintain work processes and business rules used to support task requirements.

**C.3.5.3.4 Recruitment and Retention** - Develop and implement plans for the recruitment and retention of qualified personnel needed to meet task requirements.

**C.3.5.3.5 Workforce Management** - Analyze historical work volume, employee availability and schedule preferences, and trends to accurately forecast and schedule staffing resources to meet fluctuating workload requirements for all communications channels. The Contractor shall employ proven best practices management approaches to ensure optimum utilization of available staffing resources to meet service objectives.

**C.3.5.3.6 Performance Management** - Develop and implement the required plans, procedures, methodologies, and tools, and perform the planning, oversight, and management functions to ensure that all service delivery performance standards and program deliverables specified in the task order are met.

**C.3.5.3.7 Training** - Develop and implement a comprehensive Training Plan to ensure that contact center staff provides superior levels of customer service across all customer access channels.



- 1372 C.3.5.3.8 *Quality Assurance/Quality Improvement* - Develop, implement, and manage a Quality  
 1373 Assurance/Quality Improvement Plan to ensure that services delivered comply with the performance  
 1374 standards specified by the Government.  
 1375
- 1376 C.3.5.3.9 *Continuous Process Improvement* - Develop and implement action plans based on analysis of  
 1377 performance results and customer feedback. These plans shall be available to the Government for review  
 1378 upon request.  
 1379
- 1380 C.3.5.3.10 *Information Systems Security Compliance Oversight* - Serve as a single point of coordination  
 1381 to ensure compliance with minimum federal information systems security requirements, including  
 1382 keeping abreast of and distribution of Federal security requirements, and preparation and submission of  
 1383 required documentations and deliverables pertaining to compliance with these requirements. Maintain  
 1384 Contingency/Disaster Recovery Plan and activate and oversee emergency/disaster recovery activities in  
 1385 accordance with the Plan.  
 1386
- 1387 C.3.5.3.11 *Management Reports* - Develop and deliver all requisite management reports and ensure all  
 1388 reports are accurate and provided in a timely basis.  
 1389
- 1390 C.3.5.3.12 *Value Engineering* - Develop and implement action plans to identify opportunities to  
 1391 improve service offerings, reduce costs, and increase customer satisfaction.  
 1392
- 1393 C.3.5.3.13 *Topic Trend and Reporting* - Collect information and provide reports on topics introduced by  
 1394 the public, often in response to social/political issues of the day, and to work with the Government to  
 1395 prepare appropriate responses.  
 1396
- 1397 **C.3.5.4 Technology Management**
- 98 The Contractor shall provide all required technology management services to effectively plan, implement,  
 99 operate and manage the contact center solution, including, but not limited to the following:  
 1400
- 1401 C.3.5.4.1 *Infrastructure and Network Management* - Plan, design, implement, operate, maintain, and  
 1402 manage the contact center site and technology infrastructure and related networks, including, but not  
 1403 limited to: information and telecommunications systems hardware, software, and services.  
 1404
- 1405 C.3.5.4.2 *Coordination* - Recommend, process, coordinate, and monitor telecommunications orders,  
 1406 serving as a liaison with telecommunications vendors.  
 1407
- 1408 C.3.5.4.3 *Monitoring* - Perform real-time monitoring of call delivery. Monitor network and system  
 1409 performance and identify problems and outages; compile and maintain a log of problems, outages, service  
 1410 interruptions, and unauthorized access; notify designated Government personnel promptly of any  
 1411 problems, service disruptions, and unauthorized access.  
 1412
- 1413 C.3.5.4.4 *Traffic Analysis* - Analyze traffic and usage data to determine network performance levels.  
 1414 Recommend improvements in network design in accordance with customer service standards and cost  
 1415 efficiencies.  
 1416
- 1417 C.3.5.4.5 *Optimization* - Provide optimized call routing design based on availability of network-based  
 1418 or systems-based call routing capabilities. Provide optimized automated announcement system design  
 1419 based on availability of network-based and systems-based automated announcement capabilities.  
 1420

C.3.5.4.6 *Contingency/Disaster Recovery* – Perform all functions in support of implementing the Contingency/Disaster Recovery Plan.

### C.3.5.5 Information Systems Security Management

The E-Government Act (Public Law 107-347) recognizes the importance of information security to the economic and national security interests of the United States. Title III of the E-Government Act, entitled the Federal Information Security Management Act (FISMA) requires each federal agency to develop, document, and implement an agency-wide program to provide information security for the information and information systems that support the operations and assets of the agency, including those provided or managed by another agency, contractor, or other source.

The Office of Management and Budget (OMB) through Circular A-130, *Management of Federal Information Resources*, requires federal agencies to: plan for security; ensure that appropriate officials are assigned security responsibility; periodically review the security controls in their information systems; and authorize system processing prior to operations and, periodically, thereafter. This authorization by senior agency officials, often referred to as the Designated Approving Authorities (DAA), is sometimes referred to as accreditation. The technical and non-technical evaluation of an IT system that produces the necessary information required by the authorizing official to make a creditable, risk-based decision on whether to place the system into operation is known as certification. The individual responsible for making a technical judgment of the IT system's compliance with stated security requirements, identifying, assessing, and documenting the risks associated with operating the systems, coordinating the certification activities, and consolidating the certification and accreditation documents, is referred to as the certification agent or certifier. For additional information on Federal information systems security requirements, the Contractor should consult and become familiar the publications and guidance found at the National Institute of Standards and Technology Computer Science Resources Center website at <http://csrc.nist.gov/publications/nistpubs/index.html>. Publications of special interest include but are not limited to the following:

- FIPS Publication 200, Minimum Security Requirements of Federal Information Systems
- FIPS Publication 199, Standards for Security Categorization of Federal Information and Information Systems
- NIST Special Publication 800 – 53 - Recommended Security Controls for Federal Information Systems
- NIST Draft Special Publication 800-53A – Guide for Assessing the Security Controls in Federal Information Systems
- NIST Special Publication 800 – 30 – Risk Management Guide for Federal Information Technology Systems
- NIST Publication 800-18, Guide for Developing Security Plans for Information Technology Systems
- NIST Publication 800-34, Contingency Planning Guide for Information Technology Systems
- NIST Publication 800-37, Guide for Security Certification and Accreditation of Federal Information Systems

In addition to the above documents, the contractor is expected to adhere to agency security guidelines that provide further guidance on information systems security requirements for individual task orders.

Unless stated otherwise in the task order, the contractor is responsible for preparing, managing and maintaining all required documentation and fulfilling agency reporting requirements for the FISMA compliance process, including e-authentication risk assessment, system categorization, security plan, risk assessments, contingency and contingency test plans, configuration management plan, POA&M, system test and evaluation reports, security certification and accreditation package.

The Contractor shall develop, implement, and maintain a security plan that ensures the confidentiality, integrity, and availability of information and systems for the duration of this contract. The security plan shall contain, at a minimum, the information outlined in Special NIST Publication 800-18, Guide for Developing Security Plans for Information Technology Systems. Additional information may be required at the discretion of agency DAAs in accordance with agency policies or directives as specified in task orders. The Contractor shall be responsible for preparing all required documentation needed for the compliance process. The Contractor shall assign a technically qualified Information Systems Security Manager (ISSM) who will be responsible for ensuring compliance with all Federal information systems security requirements, including the preparation and submission of the following:

*Security Plan* – provides an overview of the security requirements for the information and IT systems and describes the existing or planned controls (management, operational, and technical) for meeting those requirements. The Plan also describes the systems and delineates responsibilities and expected behavior of individuals who access the systems.

*Security Test and Evaluation Reports* – determines the systems' compliance with security requirements documented in the Security Plan and verifies that the security controls identified in the Plan are correctly implemented and effective. The Security Test and Evaluation Reports shall be prepared by a third party vendor selected and paid for by the Contractor. All work performed by the third party vendor shall be submitted, reviewed, and approved directly by the Government. The Government reserves the right to have the Security Tests and Evaluation Reports done by its own contractor. The contractor shall cooperate fully with the third party vendor or the Government's contractor in the preparation of such reports.

*Risk Assessment Report* – determines the degree of risk associated with the confidentiality, integrity, and availability of the IT systems and the information they process, store, and transmit.

*Certifier's Statement* – documents that the security controls are correctly implemented and effective in their applications. The statement provides an overview of the security status of the system, and brings together, all of the information necessary for the DAA to make an informed, risk-based decision. The contractor ISSM shall prepare all certification and accreditation (C&A) documents for submission to an agency-designated ISSM. The agency ISSM will coordinate the submission of the C&A documents to the DAA for approval.

The Contractor shall correct any deficiencies identified in the certification and accreditation process until full accreditation from the DAA is obtained. The Contractor shall implement procedures for communicating to the Contracting Officer and/or designated key personnel security-related issues that impact Contractor performance under this contract. Such procedures shall include an escalation process defining various stages of issue severity and the notification level appropriate to each.

#### **C.3.5.5.1 Personnel Security**

The Contractor shall perform appropriate personnel screening in accordance with their administrative hiring policies and agency requirements, including compliance with Homeland Security Presidential Directive 12 (HSPD-12). Such policies may or may not include collecting and reviewing any or all of the

following information for each prospective candidate to determine if the applicant is a potential candidate for employment:

- credit and/or criminal history inquiry
- employment verification
- drug screening

All information collected and actions taken shall be done in accordance with applicable Federal, state and local laws and statutes.

#### **C.3.5.5.2 Information and Telecommunications Systems Security**

The Government requires that all contractor-provided information and telecommunications systems be made secure from unauthorized access and use. Access to the required filing system, including but not limited to written correspondence, shall be limited to only those personnel who are authorized to support a given task. The Contractor shall maintain a listing of those employees with authorized access. When designing system security, Contractor shall address factors including, but not limited to:

*Information systems* - Ensure that all information handled by computer systems is protected against unauthorized access, misuse, fraud, misappropriation, espionage, sabotage, and inadvertent or deliberate compromise.

*Telecommunications systems* - Provision of telecommunications security is sufficient to protect all incoming and outgoing calls and electronic inquiries/responses, and all data collected from these activities, from unauthorized access or loss.

*Software applications and databases* - Access to software applications and databases is limited to only those personnel who are authorized to support a given task. Such restriction is accomplished through the use of customized menus, user log-on identification codes, operator-defined password protection, and or automatic timeout values. The Contractor shall use expiration dating as a method of password security maintenance.

*Internet and E-mail usage policy* - Guidelines regarding to appropriate Internet access and usage is implemented and enforced. Policies addressing access to and disclosure of electronic mail messages sent or received by employees using Contractor's corporate E-mail system shall also be implemented and enforced. Such guidelines will inform employees that their privacy does not extend to their use of Contractor-provided equipment or supplies.

*System testing* - System testing is performed on a regular basis to monitor adherence to, and compliance with, stated security measures.

*Audits* - Contractor shall be subject to periodic system audits in the same manner and fashion as conducted by the Government. Such audits shall relate to both Contractor-provided systems and Contractor's use of Government-provided data under this contract. Examples of such audits include IG and security audits, generation of active employee listings to verify user identification maintenance practices, retrieval of user activity reports and archived security information, and demonstration of Contractor's ability to monitor, collect, store, and control access to usage data.

*Proper Notification* - Contractor shall report all attempts made, whether successful or not, to breach the physical security of the facilities or primary data centers where the work is performed, or any related

telecommunications and information systems that support each task. The Contractor shall adhere to applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the incident. In rare instances, the Contractor may receive calls that threaten the well being of the Government and/or other personnel or property. The Contractor shall ensure that procedures are in place to report the calls immediately to the appropriate law enforcement agency(ies).

#### C.3.5.5.3 Facility Security

Contractor is responsible for providing a physically secure facility for people, equipment, and documentation. All security requirements apply to the Contractor facility, alternative facility, or any subcontractor facilities. When designing physical security measures, Contractor shall address factors including, but not limited to:

*Controlled access* - All personnel who enter the facility shall be issued a badge or identification card. Employees have a permanent badge and approved visitors receive a temporary badge. In general, facility access is limited to: Contractor personnel performing work under contract; authorized Government personnel; maintenance personnel or suppliers performing upkeep or repair of facilities or equipment; customer personnel visiting the site on official business; and personnel as approved jointly by Contractor and the Government. Contractor must obtain Government approval prior to granting either current or potential customers access to areas where Government work is performed. Terminated employees shall have their badges removed and their accounts deactivated and/or deleted from any system access immediately upon termination. Proof of such removal shall be documented by Contractor and made available to the Government upon request.

*Data and telecommunications center* - The primary data and telecommunications center is secured through the use of key-code access or equivalent technology with entrance granted only to those requiring access to this area on a regular basis to perform their normal job functions or who are escorted as in the case of visitors or technicians.

*Confidential information* - Subsequent to the award of each task order, the Government will provide Contractor with a listing of items it deems proprietary and confidential in nature. Examples of such data include, but are not limited to, customer names, addresses, and social security numbers. Contractor shall implement appropriate security measures to ensure such data is safeguarded in a manner consistent with those employed by the Government. Examples of data security include locked file storage, confidentiality stamping, restricted system access, data encryption, restricted print options, and disposal by shredding.

*Proper notification* - Contractor shall report all attempts made, whether successful or not, to breach the physical security of the facilities or primary data centers where the work is performed, or any related telecommunications and information systems that support each task. The Contractor shall adhere to applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the incident. In rare instances, the Contractor may receive communications such as calls or e-mail that threaten the well being of the Government and/or other personnel or property. The Contractor shall ensure that procedures are in place to report the threatening communications immediately to the appropriate law enforcement agency(ies).



**C.3.5.5.4 Contingency/Disaster Recovery**

The Contractor shall develop and implement, as part of the Security Plan, contingency/disaster recovery plans and procedures addressing operations in the event of a shutdown or lapse in service for any reason. This is to minimize service disruption to Government customers. The plan shall identify risks as well as steps necessary to prevent it from happening in the first place. The plan shall include an alternate set of steps to minimize the impact should prevention fails. The plan must define the precise steps to be taken to recover as quickly as possible, including recovery procedures for physical facility, data systems, contact center systems and applications, communications networks, electrical service, customer access points, partners and procedures, and staff. The Contractor shall develop and implement procedures to test the plan on an annual basis, at a minimum. The plan shall be developed in accordance with Contingency/Disaster Recovery requirements specified in individual task orders and applicable agency IT Security Policy and NIST Special Publication 800-34, Contingency Planning Guide for Information Technology Systems.

**C.3.5.5.4.1 Program Operations Recovery**

In the event of periodic or catastrophic failures that restrict or terminate program operations, the design of both the contact center infrastructure and the communications network servicing the Government requirements shall include sufficient redundancy to allow normal business operations to continue with minimal disruption and inconvenience to customers for all access channels.

**C.3.5.5.4.2 Voice Recovery**

When designing disaster recovery plans for the communications network, Contractor shall address factors including, but not limited to:

- Network routing - If an individual facility should become inaccessible, a sufficient communications network shall be in place to allow for forwarding of customer calls to one or more alternate facilities. If the outage is brief, the network shall resume normal call routing as soon as the primary facility is operational again.
- Operational impact - Documented policies shall exist for assuming workload from an incapacitated facility for immediate, short-term, and long-term relief.
- Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of preparing the staff and assessing the plan's viability.

**C.3.5.5.4.3 Data Recovery**

When designing disaster recovery plans for data recovery, Contractor shall address factors including, but not limited to:

- Backup routines - The ease and frequency of which backup routines are conducted and the ability to backup data on remote servers/processors.
- Effectiveness - The degree to which data can be compressed for backup purposes and the ability to perform unattended backups on high-density/high-capacity storage devices.
- Operational impact - The time that is required to complete backups and the need to remove users from the system to conduct backup routines.

- Data integrity - The methods of maintaining data integrity so that completed transactions are not lost due to outages, system failures, etc. In long-running transactions, such as when a IS needs to navigate several screens of data entry, there should be interim checkpoints that save the transaction so that it may be re-entered from the last checkpoint if the transaction wasn't completed prior to the failure.
- Data recovery - The methods of restoring data from backup in the event of a failure (e.g., commercial power failure, system or hardware failures).
- Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of preparing the staff and assessing the plan's viability.

#### C.3.5.5.4.4 Notification Process

Contractor shall implement procedures for communicating to the Government primary point of contact and/or designated key personnel disaster-related issues that inhibit contact center operations. Such procedure shall include an escalation process defining various stages of issue severity and the notification level appropriate to each.

#### C.3.5.6 Content and Knowledge Management

The Contractor shall perform all content and knowledge management functions including the following:

*Automated Voice Response Development and Maintenance* - The Contractor shall be responsible for call flow design and development and maintenance of the information content and audio messages used for all automated voice response services, such as IVR, voice recognition, and text-to-speech services. The Contractor shall provide analysis and ongoing support for script design and optimization, call flow analyses, service request processing and coordination, if required, and script management. The Contractor shall develop and regularly maintain messages for the automated voice response services in keeping with the current informational needs of the callers. The Contractor shall work closely with the Government to develop the automated responses. The Government shall approve all automated responses before they are implemented. The Contractor shall ensure timely updates of all automated messaging in accordance with the turnaround timeframes established by the Government. At a minimum, Contractor shall post changes within 24-hours of receipt for all non-emergency information and within 2-hours of receipt for emergency notices. Support for emergency postings and updates, as determined by the requesting agency, is required on a 24 hour a day, 7 day a week basis.

*Knowledge Management* - The Contractor shall develop, implement, administer and manage the required knowledge management system to effectively meet task order requirements. The Contractor shall update, revise, and otherwise maintain currency and accuracy of the knowledge base as new information becomes available. The Contractor shall incorporate best practices in system design to minimize the burden of maintaining the required knowledge base and maximize its effectiveness. The Contractor shall develop systematic approaches to finding, understanding, and using relevant knowledge to achieve task objectives, including, but not limited to, reviewing newspapers, the Internet, publications, and other information resources. The knowledge management system shall be accessible to all Contractor personnel. The Contractor shall also provide access to the system via the Internet to designated Government employees at remote locations. The number of individuals to be provided access will be specified in individual task orders. Access to the knowledge databases shall be limited based on the individual user's program support needs and level of authority, and shall be restricted only to authorized personnel. The Government will brief the Contractor on the relevant programs and services and current business processes, and provide the initial content data to be recorded in the knowledge management system.



Subsequent to the initial effort, the Contractor shall provide services, including, but not limited to the following:

- Collect, organize, select, record, verify, update, and present relevant information in the knowledge management system on an ongoing basis.
- Update and manage the content of the knowledge management system on an on-going basis.
- Develop a procedure to ensure agency concurrence on all updates and information dissemination from the knowledge management system to any other media.
- Conduct research of agency-approved sources of information and develop appropriate responses to customer inquiries.
- Organize information into suitable means for easy access by all contact center employees, Government employees, and/or customers.
- Analyze usage data of the knowledge management system to determine trends and patterns.
- Analyze new inquiries and inquiry trends to develop responses based on research.
- Collect, organize, and prepare information and answers to frequently asked questions for dissemination using automated systems, such as interactive voice response, automatic fax-back, information search and retrieval systems, and web-based systems.
- Where new and topical inquiries arrive, have a mechanism for collection (from IS to management), quick preparation of response, and a means of advising the Government of these sudden unexpected influxes of question categories
- Ensure that, where applicable, additions, changes, or deletions of materials from the knowledge database are carried over to corresponding IS training and support materials.
- Website Content Coordination - The Contractor shall share relevant inquiry data and trends with agency web support team to ensure that information provided at the agency websites and the contact center is accurate, up-to-date, and meets the needs of agency customers.
- Filing System - The Contractor shall establish and maintain a filing system that shall allow Government oversight of, at a minimum, written and electronic correspondence, employee (but not individual) performance, work stoppages, agency liaison, hardware and software maintenance, database maintenance, call data, and contract reports.

#### **C.3.5.7 Contact/Case Management**

The Contractor shall develop, implement, administer and manage the required contact/case management system to effectively track the status and disposition of all customer contacts as required in individual task orders. The Contractor shall incorporate best practices in system design to minimize, to the extent possible, keystrokes or data entry required for recording inquiry tracking and management data (i.e., use of preformatted data entry forms with pull-down and/or multiple choice selection items). This system shall be accessible to authorized contractor personnel and Government employees onsite and via Internet access from remote locations. Access to the contact/case management shall be limited based on the individual agency program support needs and level of authority, and shall be restricted only to authorized

personnel. The Contractor shall obtain Government approval to ensure usefulness and efficiency in the design of any screens related to inquiry tracking and management.

#### C.3.5.8 Relationship Management

The Contractor shall provide required customer coordination support to meet task order requirements, including, but not limited to the following tasks:

- Coordinate with Government agency representatives, business partners, contractors, and other relevant individuals or organizations to discuss implementation, operational, and programmatic issues.
- Provide planning and coordination support to implement and manage the Directory Listing Service.

#### C.3.5.9 Customer Satisfaction Assessments

The Contractor shall provide support to design, develop, and implement customer satisfaction surveys in conjunction with Government personnel to measure the performance level of the Contractor-provided services. The Government will obtain all appropriate approvals in compliance with Federal regulations and statutes prior to initiating any survey activities. The Contractor shall analyze the results of the customer satisfaction assessment to determine customer perceptions about the quality of the service delivery. Contractor shall use these results to develop and implement action plans to continually improve customer satisfaction, and shall provide the results of both the survey and action plans to the Government for review upon request.

#### C.3.6 Special Project Support

The Contractor shall provide technical and management support needed to analyze, plan, design, implement, operate, and manage special services that may be needed to meet the diverse needs of the Government. These special services (e.g. web hosting, prototyping of new capabilities, special applications and systems interconnectivity) will be priced on a task order-by-task order basis utilizing the support functions identified in Section C.3.5 of this SOW, as deemed appropriate by the Contractor. The Contractor shall provide all necessary personnel, facilities, equipment and services needed to support special services as identified in task orders issued by the Government. Equipment, software, and services not otherwise priced in Section B may be priced as Other Direct Costs (OCD).

### C.4 STAFF TO BE PROVIDED

The Contractor is expected to support the diverse needs of a wide range of Government programs. The Contractor shall provide qualified personnel in sufficient quantities to perform the functions identified in this SOW and individual task orders. Unless specifically allowed in individual task orders, all work performed shall be at contractor-managed facilities. All matters pertaining to the employment, supervision, compensation, promotion, and discharge of the Contractor's employees shall be the responsibility of the Contractor, which is in all respects the employer of such employees. All proposed substitutes for key personnel shall meet or exceed the qualifications of the person to be replaced. The Government shall be notified in writing of any proposed substitution of key personnel at least thirty days in advance of the proposed substitution.

The Contractor shall perform background checks on all prospective employees in accordance with applicable agency Personnel Security Handbook prior to providing them for service under the contract. At a minimum, this check shall ensure that no prospective employee has a criminal misdemeanor or a

felony record and has a satisfactory history of credit. Additional background checks or security clearances may be required as specified in individual task orders.

#### C.4.1 Key Personnel

The Contractor must have the capability to provide qualified personnel to meet the specific requirements of each task order. At a minimum, the Contractor shall provide the following key personnel:

**C.4.1.1 Program Manager** - responsible for managing and implementing the overall contract requirement and oversee implementation of more complex tasks; organizes, directs, coordinates planning, and implements all contract and/or task order support activities; interacts with high level program officials regarding issues and status of the contract and/or task orders; coordinates financial and staffing resources; monitors and analyzes contract and performance data and reports results to senior Government officials; coordinates recruitment and training activities to keep staff current on agency programs and performance objectives; manages the activities of subcontractors; and reviews contract, operations and management reports. The Government reserves the right to approve the selection of the Contractor-assigned Program Manager prior to his/her placement in supporting the task if such assignment is warranted.

**C.4.1.2 Project Manager** - responsible for managing and implementing individual task requirement; organizes, directs, coordinates planning, and implements all project support activities; interacts with program officials regarding issues and status of the project; coordinates financial and staffing resources; monitors and analyzes performance data and reports results to the Government; coordinates training activities to keep staff current on agency programs and customer service objectives; manages the activities of subcontractors; and prepares operations and management reports. For each task, the Government reserves the right to approve the selection of the Contractor-assigned Project Manager prior to his/her placement in supporting the task.

**C.4.1.3 Site Manager** - responsible for overall daily operations and management of the contact center, including staffing, facility, training, service delivery, problem escalation and resolution, and performance monitoring; provides technical assistance to the planning, design, installation, modification, and operation of telecommunications and information systems capabilities; ensures all functions and processes are implemented and operated properly.

**C.4.1.4 Information Systems Security Manager (ISSM)** - responsible for ensuring that information systems used in supporting task requirements meet initial and ongoing compliance of information systems security requirements in accordance with FIPS Publication 200, Minimum Security Requirements of Federal Information Systems. The ISSM shall ensure that information systems used to support a specific task meet the minimum security requirements as defined in FIPS Publication 200 through the use of security controls in accordance with the NIST Special Publication 800 - 53, Recommended Security Controls for Federal Information Systems, As Amended. This includes preparing all required documentations for the compliance process, including security plan, risk assessments, contingency and contingency test plans, configuration management plan, system test and evaluation reports, security certification and accreditation package.

To meet specific task requirements, the Government may require the assignment of one or more key personnel in support of a task. The Government may also identify additional key personnel requirements in individual task orders.

#### C.4.2 Support Staff

The Contractor shall provide sufficient qualified support staff to perform functions including, but not limited to:

C.4.2.1 *Human Resources Management* - ensure the placement of qualified candidates into open positions by participating in employment-related activities such as recruiting, screening, testing, evaluating, behavioral interviewing, and hiring for a wide variety of positions; prepares employment-related reports; conduct new employee orientation sessions; experienced in employee relations, legal compliance, and compensation matters.

C.4.2.2 *Supervision* - supervise and coordinate the daily workflow to ensure productivity and quality standards are met and customer service efforts are consistently achieved; assist the manager in the administration of the unit; provide leadership, guidance, training, and work direction to assigned personnel to ensure goals and objectives are met; foster a work environment that respects individuals, promotes teamwork, and encourages innovation and creativity.

C.4.2.3 *Quality Assurance* - assess the quality of service provided by ISs through monitoring incoming calls and other work types while focusing on the quality of customer service, accuracy of information provided, and adherence to departmental policies and procedures; analyze operational performance against company and customer expectations and identifies areas of competency and areas of needed improvement; establish and maintain systems for capturing, analyzing and reporting quality measures; interface with other operational and cross-functional areas to ensure consistency in reporting practices and to help determine quality needs; provide recommendations on continual process improvement.

C.4.2.4 *Training* - design, develop, evaluate, and deliver training programs for all levels of staff; evaluate the applicability and quality of training programs offered by outside vendors; complete needs assessments to identify future training needs and provide guidance to staff on matters related to continuing education; design course manuals, support materials and tools; perform administrative duties related to employee training such as scheduling classes, ordering/maintaining supplies, maintaining training records and a library/database of training materials and subject matter experts; conduct surveys of training and equipment needs; conduct follow up studies to determine overall training effectiveness; prepare formal reports and correspondence. Where appropriate, effective, and efficient, arrange for training, initial or refresher, by Government staff if the Government agrees.

C.4.2.5 *Service Level Management* - manage overall forecasting and staffing processes to ensure efficient, cost-effective overall IS utilization; creates, execute and oversee effective plan (annual, weekly, daily); work closely with Project and Site Managers to assist in determining future staffing requirements, optimize site scheduling, balance workload across the network, maximize performance and meet overall objectives; review on an on-going basis, existing technologies and software recommending changes as needed to ensure maximum utilization of resources; manage actual performance feedback against targets, identify shortfalls, take corrective action and make adjustments accordingly; conduct need assessment to ensure continual improvement of overall forecasting and staffing performance.

C.4.2.6 *Knowledge/Content Management* - research and resolve open issues by thorough and efficient investigation; create, index, and maintain knowledge database records and answers to FAQs; ensure the accuracy and clarity of information recorded; purge outdated records from the system in accordance with records management guidelines provided by the agency; communicate record additions or changes to all staff on a timely basis.

C.4.2.7 *Inquiry tracking* - capture and track all relevant information and disposition of all inquiries; ensure inquiries are completed on a timely basis.

C.4.2.8 *Technical support* - ensure all areas of systems architecture, security, design, development, analysis, installation, programming, testing, maintenance, administration, and ongoing support for contact center hardware, software, network, telecommunications, and Internet equipment and services.

This is not a complete list of all responsibilities, duties, efforts, or skills associated with these positions, but is intended to serve as an overview of the functions that the Contractor is expected to perform.

#### C.4.3 Information Specialists (IS)

The Contractor shall provide sufficient contact center IS staff to perform the functions specified in individual task orders. The Contractor shall ensure that ISs possess the appropriate qualifications and skills required to perform the task. Unless specifically authorized in the task orders, all ISs shall be situated in contractor-provided facilities with restricted access.

C.4.3.1 Qualifications - Each member of the Contractor-provided IS staff shall meet the following minimum requirements:

- High school diploma or General Educational Development (GED) Certificate
- Language proficiency equivalent to meeting an Interagency Language Roundtable (ILR) Level-5 or S-5 requirement. An individual at this level is described as follows: a) has a speaking proficiency equivalent to that of an educated native speaker; and b) has complete fluency in the language, such that speech on all levels is fully accepted by educated native speakers in all of its features, including breadth of vocabulary and idiom, colloquialism, and pertinent cultural preferences.

C.4.3.2 Competencies - The Contractor-provided IS staff shall demonstrate the requisite skills and knowledge to perform the following functions, at a minimum:

- Oral and written communication skills sufficient to facilitate clear and accurate information exchanges with customers.
- Ability to control the pace and flow of the inquiry/request and manage call time effectively.
- Ability to handle inquiries and requests in a courteous and professional manner, including calls received in crisis situations, and/or from abusive callers.
- Ability to listen to and empathize with customers and acknowledge their concerns.
- Ability to follow protocol and to apply sensitivity and discretion in handling confidential information.
- Ability to gather information to determine a customer's needs, apply problem-solving skills, and resolve the inquiry/request effectively.
- Computer and keyboarding skills sufficient to record information from the inquirer in an accurate and efficient manner.
- Ability to use the web to search and retrieve information.

- Ability to receive inquiries from the hearing, speech, and visually impaired, as well as other physically impaired callers and route them to the appropriate IS or queue for response.
- Ability to take direction within a team setting and complete team-related work promptly.
- For IS assigned specifically to support TTY callers, ability to effectively respond to inquiries using appropriate equipment.

#### C.4.3.3 Skills Categories

The Contractor shall provide qualified personnel in sufficient quantities to perform the functions identified in task orders issued by the Government. The Contractor is expected to support the diverse needs of Government programs. The skills categories identified below are those that the Government anticipates may be required to satisfy the diverse needs of agency programs. The specific skills category(ies) required will depend on the complexity of work to be performed, as identified in individual task orders. The Government reserves the right to add other skills categories to meet agency requirements at any time during the effective period of this contract.

**C.4.3.3.1 Level 1** - Handles telephone and e-mail inquiries that are routine and transactional in nature. Captures or disseminates basic information, utilizing a prepared script. Little or no deviation from script is permitted in responding to inquiries. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems. Requires High School diploma, or GED.

**C.4.3.3.2 Level 2** - Handles inquiries received via multiple communication channels (e.g., phone, e-mail). Nature of inquiries involves subjects that are moderate in complexity. Responses are generally scripted but may require probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems. Requires High School diploma, or GED and some college, or equivalent combination of education and prior customer service experience. Requires general knowledge of Government programs.

**C.4.3.3.3 Level 3** - Handles inquiries via multiple communication channels. Nature of inquiries involves subjects that are high in complexity. Responses are not scripted and require frequent probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems. Requires Associate degree and prior experience in one or more specialized areas. Requires specialized knowledge of Government programs and/or subject matters.

**C.4.3.3.4 Level 4** - Handles inquiries via multiple communication channels. Nature of inquiries involves subjects that are very high in complexity and requires subject matter experience. Responses are not scripted and require extensive probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, knowledge and contact management systems, and other specialized systems. Requires Bachelors degree or equivalent work experience and subject matter experience.

**C.4.3.3.4 Level 5** - Handles inquiries via multiple communication channels. Nature of inquiries involves subjects that are highly specialized and requires subject matter expertise. Responses are not scripted and require extensive probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems, and other specialized systems. Requires advanced degree or equivalent work experience and subject matter expertise.

**C.4.3.3.5 Minimum Qualifications Requirements for Supervisory Information Specialists**

In addition to meeting minimum education and/or experience requirements specified for Information Specialists specified above for the respective skill category, Supervisory Information Specialists shall meet the following minimum requirements:

- Two or more years experience serving as an Information Specialist at the respective skill level, or one or more years of experience supervising Information Specialists at the respective skill level.
- Excellent oral and written communications skills
- Strong organizational skills
- Skilled at oral and written reviews as well as coaching to improve performance
- Must be positive and self-motivated with the ability to change priorities on demand
- Solid understanding of computer basics (Windows, Excel, Word, Operating Systems and Internet applications such as web, email, and chat).

**C.4.3.4 Multi-language Support**

The Contractor shall provide qualified personnel in sufficient quantities to meet the language requirements specified in individual task orders. At a minimum, the Contractor must have the capability to supply ISs who are proficient the following languages:

- English
- Spanish
- Mandarin
- Cantonese
- French
- German
- Japanese
- Korean
- Vietnamese

The specific language requirement and associated work volumes will be specified in individual task orders issued by the Government. The Contractor shall incorporate all appropriate considerations for multi-language requirement into the support for each task including, but not limited to, areas such as training, quality monitoring, supervision, and automated services.

**C.5 FACILITIES TO BE PROVIDED**

**C.5.1 General**

The Contractor shall provide adequate facilities to support the contact center operations, including, but not limited to the following:

- Work areas,
- Employee lounge areas,

- 2055 ○ Storage areas,
- 2056 ○ Training and conference facilities with supporting audio and visual equipment,
- 2057 ○ Telecommunications and computer facilities,
- 2058 ○ IS work stations, including modular and/or other furniture and chairs,
- 2059 ○ File cabinets and file storage systems,
- 2060 ○ Lighting and office appliances, and
- 2061 ○ Other required office furnishings.

2062 The Contractor is responsible for the ongoing maintenance, upkeep, and management of the contact  
 2063 center facilities. For security purposes, the Contractor shall generally be prohibited from identifying the  
 2064 facility(ies) as supporting Government business on either the exterior building walls or signage. Specific  
 2065 approval to do so can only be granted by the Contracting Officer.

#### 2066 **C.5.2 Facility Infrastructure**

2067 The Contractor shall be responsible for the acquisition, installation, and maintenance of all cable, wiring  
 2068 and support infrastructure required to operate the facility, including, but not limited to: cable distribution  
 2069 systems; conduits; terminals and connectors; raised flooring; and other equipment needed to interconnect  
 2070 and support the contact center systems and operations.

#### 2071 **C.5.3 Site Selection and Facility Design Requirements**

2072 When selecting and/or designing contact center site, the Contractor shall factor in the following:

- 2073 ○ The site selected shall provide a geographic location chosen to minimize the effect of catastrophic  
 2074 weather conditions on customer contact center operations. For multi-site solutions, the sites shall  
 2075 be spaced located in different geographic locations to minimize the possibility of adverse weather  
 2076 conditions affecting the operations
- 2077 ○ The site shall be located at a safe location deemed appropriate for contact center operations.
- 2078 ○ The site shall be easy to access in terms of relative proximity to local air transportation and major  
 2079 air carrier services.
- 2080 ○ The site shall be located within the United States unless specifically approved by the  
 2081 Government.
- 2082 ○ The site shall be designed and built to comply with all applicable state, local, and Federal  
 2083 Government standards and regulations, such as the Occupational Safety and Health Act (OHSA)  
 2084 of 1970, as revised, and the Americans with Disabilities Act of 1990. The site shall remain in  
 2085 compliance with such standards and regulations throughout the term of the contract.
- 2086 ○ The site shall be situated in a location where the local labor market can support the contact center  
 2087 size and the skill sets of the labor pool required to support the task requirements, including  
 2088 foreign language, subject matter expertise, and other special requirements that the programs may  
 2089 present. Considerations should include the degree of competition for the labor pool from other  
 2090 contact centers and related industries and its impact on recruiting and retaining contact center  
 2091 personnel.



- The site shall be designed to provide an office environment that is conducive to providing customer support, supporting private conversations, and facilitating communication among staff.
- The site shall be designed to provide space, furnishing, acoustic, lighting, and temperature environment that meets or exceeds contact center industry standards.
- The site shall be designed to accommodate modern telecommunications and computer systems and contact center furnishing.
- The site shall be designed to meet other environmental control standards that are in compliance with Federal, state, local, and industry standards.
- The site shall be supported by an appropriately sized backup generator and a non-interruptible power supply.
- The site shall be designed to provide redundant, high bandwidth, high availability connections to the telephone network and the Internet.

#### **C.5.4 Project Housing**

The Contractor-provided workspace assigned to support specific tasks shall meet the following criteria:

- Contiguous workspace shall be provided for the entire complement of IS staff supporting a specific task within a given site.
- Security of information is a key concern of the Government. The Contractor shall provide a secure facility with restrictive access to only those Contractor employees and authorized Government representatives who support specific tasks.
- Unless specifically authorized by the Government on an individual task order basis, hoteling of IS seats, whereby no specified grouping of seats is assigned to the task on a permanent basis, is not permitted.
- Contractor shall designate at no additional cost to the Government a non-exclusive space for an authorized Government representative, to work when onsite. The space shall include enclosed office space and workstation, computer and Internet access, telephone and modem lines, administrative support and services, and security. Transitory Government personnel shall be provided workspace if available.

##### **C.5.4.1 Exclusive-Use Space**

To meet specific program requirements, the Contractor may be requested to provide space for the exclusive use of one or more authorized Government representatives. Specific space requirements, if required, will be included in individual task orders.

#### **C.5.5 Facility and Systems Access**

The Contractor-provided facilities and systems shall be designed to provide physical and information access security with security monitoring and access restriction at all times. Access to the contractor-provided facilities shall be provided to authorized Government personnel at anytime during the normal

operation of the contact center. Access to contractor provided systems, including remote access by Contractor employees and authorized Government employees, shall be restricted to authorized personnel at all time.

Designated Government employees, and/or their authorized representatives may visit any contact center facility used to support its programs without prior notice for the purpose of conducting on-site reviews, information gathering, or program observation.

## **C.6 TECHNOLOGY INFRASTRUCTURE TO BE PROVIDED**

The contractor shall provide and maintain robust and scalable, state-of-the-art multi-channel contact center system hardware, software, and accessories to meet task order requirements. The Contractor shall provide a commercial off-the-shelf (COTS) solution that meets the Government requirements. The systems shall be adequately sized and equipped to handle fluctuations in the volume of inquiries received. The systems shall be configured such that they can be easily expanded to accommodate growth in work volume. The systems shall have adequate backup capability to maximize availability and reliability of all services. At a minimum, the system shall be Section 508 compliant and meet the requirements specified in Sections C.6.1 through C.6.15 below. Call processing and E-mail routing and management systems provided by the contractor shall incorporate automated capabilities to perform periodic checks on the systems to verify operational status of the contractor systems and alert contractor's system maintenance personnel and/or the Government if there is a failure.

Contact center staff shall be provided desktop workstations, including computers, telephones and headsets, and other equipment, software, and accessories required to sustain contact center operations. Unless specified by the Government, all workstations shall be equipped with telecommunications, e-mail and Internet access.

### **C.6.1 Call Processing Technology and Services**

Contractor shall provide the required call processing technology and services to handle the workload presented by the Government. These include, but are not limited to:

**C.6.1.1 Call Routing and Distribution** – The system shall provide routing/distribution of incoming calls based on sequence of arrival/origination, inquiry type, IS availability and skills, contact center availability, or other predefined routing instructions, as specified by the Government. The system shall provide at a minimum:

- The capability to monitor and visually display the work state and availability status of all ISs on a real-time basis.
- The capability to display call-handling statistics real-time.
- The capability to provide electronic and hard copy reports on all trunks, IS, and workgroup performance statistics.
- The capability to provide incoming calls by Dialed Number Identification Service (DNIS) reporting.
- The capability to originate and least-cost route outgoing and follow up calls.
- The ability to transfer calls within the contact center or to transfer calls to other locations via attended or unattended transfers.

2201 C.6.1.2 *Automated Fax-Back/Fax on Demand* – The system shall have the capability to allow  
 2202 customers to generate a request for a document to be automatically sent to their fax machine. This  
 2203 function can also be activated internally by a IS to send documents to a customer's fax machine.  
 2204

2205 C.6.1.3 *Automatic Numbering Identification (ANI)* - Certain caller information, such as the caller's  
 2206 telephone number, may be used to identify the caller and access caller information to facilitate customer  
 2207 service and/or to support the compilation of caller demographic information. Numeric area code  
 2208 information shall be translated to reflect its corresponding geographic location (e.g., area code 202 would  
 2209 be reflected as Washington, DC) for reporting purposes. The contact center system shall be ANI-enabled  
 2210 and possess any additional software required to support such functionality.  
 2211

2212 C.6.1.4 *Accounting and Management* – The system shall provide accounting and management  
 2213 capabilities for all inquiry types.  
 2214

2215 C.6.1.5 *Call Queuing* – The system shall queue incoming calls and provide callers with an estimated  
 2216 wait time in queue and other recorded messages. The system shall provide the caller with an option to  
 2217 stay in queue or leave a message for callback based upon response to prompts. During or upon  
 2218 completion of the callback message, callers shall have the option of returning to the queue without losing  
 2219 his or her place in the queue.  
 2220

2221 C.6.1.6 *Call Transfer* – The system shall be capable of transferring calls to a different workgroup  
 2222 within the contact center and/or to a workgroup located in a different contact center via blind or attended  
 2223 transfer, as specified by the Government. The call transfer function may be activated automatically by the  
 2224 caller or manually through the IS. The Contractor shall provide the most efficient and cost effective way  
 2225 of transferring the calls unless otherwise directed by the Government. The system shall be capable of  
 2226 tracking the quantity and duration of calls transferred from one program to another program within the  
 2227 Contractor's system.  
 2228

2229 C.6.1.7 *Computer Telephony Integration (CTI)* – The system shall be capable of displaying caller-  
 2230 relevant information at the IS workstations (e.g., via screen pop technology). The displayed information  
 2231 may be triggered by DNIS, and/or ANI information, and/or through information entered by the caller or  
 2232 IS, and/or through data gathered by the IVR service.  
 2233

2234 C.6.1.8 *Dialed Number Identification Service (DNIS)* – The system shall be DNIS-enabled, in order  
 2235 to distinguish incoming calls by the called number and route them to the appropriate response system  
 2236 and/or IS. The system shall be capable of providing the appropriate program identification (e.g., via  
 2237 whisper announcement) at the IS workstation.  
 2238

2239 C.6.1.9 *Automated Voice Response* – The system shall be equipped with innovative and effective  
 2240 automated voice response solutions that enables the callers to obtain answers to frequently asked  
 2241 questions quickly and in a customer friendly manner. The solutions include the use of IVR, voice  
 2242 recognition and text-to-speech technologies. The system shall have the ability to quantify (aggregate by  
 2243 menu and message) the selections of callers by business and non-business hours and days for reporting  
 2244 purposes. The system shall accommodate callers with touch-tone and rotary telephones/dial pulse  
 2245 telephones who seek information via self service and/or assistance.  
 2246

2247 C.6.1.10 *TDD/TTY Calls* – The system shall be equipped with Telephone Device for the Deaf (TDD)  
 2248 or TTY (ASCII) terminals for responding to inquiries from individuals who are hearing and visually  
 2249 impaired.  
 2250

C.6.1.11 *System Capacity* – The Government requires that Contractor provides sufficient capacity on the system to support projected call volumes, workload estimates, and call routing in accordance with service level goals (e.g., blockage). The Contractor shall provide sufficient expansion capability to accommodate call pattern variations.

## C.6.2 E-Mail Routing and Management

The contractor-provided e-mail routing and management system shall be integrated with the inquiry processing system described in Section C.6.1 to ensure efficient staff utilization. At a minimum, the system shall provide the following:

C.6.2.1 *Time/Date Stamping of Receipt* – automatically stamps the time and date of receipt of e-mail messages.

C.6.2.2 *Auto Copy of Messages Upon Receipt* – automatically forwards a copy of the e-mail messages to up to 3 Government-designated e-mail addresses immediately upon receipt.

C.6.2.3 *Automated Inquiry Tracking Number Assignment* – automatically assigns a tracking number to each incoming e-mail message; provides a capability to automatically assign sub-tracking number(s), when prompted, for tracking e-mail messages forwarded to multiple agencies.

C.6.2.4 *Auto-Message Processing* – monitors incoming mailboxes for incoming mail; automatically scans, filters, analyzes, sorts, categorizes, prioritizes, routes, queues, and responds to e-mail messages based on predefined rules; includes spam control, auto-acknowledgement, content-driven auto-response, and external notification capabilities. The auto-acknowledgement and auto-respond features must be able to retrieve the e-mail address of the inquirer from a web e-mail form, an auto-forwarding e-mailbox, and/or free form e-mail and use it for responding to the inquiry. To the extent practicable, the e-mail system shall employ automated means to remove extraneous routing and other information from the response (rather than relying on manual action by the IS) before its transmission.

C.6.2.5 *Automated Response Aids* – provides storage and retrieval of customized and preformatted messages, automated response suggestions, spell-check, and auto-text insertion of commonly used words, phrases, and responses to enhance response efficiency.

C.6.2.6 *Attachments/Web Links* – provides the ability to receive e-mail attachments and send attachments and/or embedded web links with the outgoing e-mail message.

C.6.2.7 *Monitoring* – allows customer support supervisors, managers, and up to 5 designated Government representatives from remote locations, to closely monitor message queues, agent activity, and performance levels; provides automatic escalation of messages that are past performance level thresholds.

C.6.2.8 *Mail Tracking* – allows off-site respondents to receive and respond to messages via their existing e-mail client, while maintaining full message tracking.

C.6.2.9 *Inquiry Tracking* – records and tracks all relevant information and disposition of all e-mail inquiries; provides problem-tracking functionality and is capable of recording and generating records of problems reported, tracking the problem through to resolution, and maintaining historical data on problems by the inquirer and by problem category and frequency. Case tracking database information shall be available to ISs for inquiry and real-time update as appropriate.

C.6.2.10 *Management Reports* – provides a full array of scheduled and ad hoc management reports in a commonly used electronic format that track e-mail volume statistics, category and agency breakouts, historical data, trends, case tracking, productivity and performance measurements. The reports shall include both summary and detailed data. The Contractor shall assure that the information on the reports can be grouped and sorted by the fields in the inquiry tracking database. Reports shall be accessible via a secure web site. The preferred delivery method will be through the use of XML.

C.6.2.11 *Interoperability* – The systems shall be able to exchange e-mail with Government e-mail systems.

C.6.2.12 *Security* – security all required measures to ensure that the security of the e-mail and associated systems are not compromised (e.g. content checking, anti-virus, e-mail exploit detection and defense, and threats analysis).

C.6.2.13 *Storage* – provides sufficient capacity to store all incoming and outgoing e-mail messages, case tracking data, and other relevant information - at a minimum - for the current fiscal year and the previous fiscal year.

C.6.2.14 *Mass Mailing* – provides the ability to transmit information via e-mail to lists of recipients stored within the system in accordance to pre-established schedule and/or as directed in the task orders.

C.6.2.15 *Message Blocking* – provides the capability to automatically block e-mail inquiries sent from other than web form(s) designated by the Government from reaching the e-mail messaging system. This includes replies to the Contractor's responses sent by the inquirers using the "reply to" function.

C.6.2.16 *Auto Copy of Responses* – provides the capability to send a copy of the responses via bcc to up to 5 e-mail addresses at the time of the response.

### C.6.3 FAQ System

The Contractor shall provide a reliable, scalable, and secure FAQ solution that provides the capabilities specified in Section C.3.1.11 of this SOW.

### C.6.4 Knowledge Management System

The Contractor shall provide an integrated knowledge management system to store, organize, search and retrieve knowledge needed to respond to inquiries received via all communications channels, including those received through the hosted FAQ service. The service shall incorporate innovative self-learning or equivalent technology to analyze, organize, and present information to enhance the user's ability to effectively find information. At a minimum, the system shall have the following capabilities:

6.4.1 Real-time access to knowledge base via an easy-to-use secure web or equivalent interface for posting, updating, searching and retrieving information, including management reports by authorized personnel. Capability of sharing FAQ answers and information in the knowledge base with other systems and/or services through the use of XML.

6.4.2 Real-time and historical insight in the usage pattern and usefulness of the stored knowledge.

6.4.3 Real-time access to search and retrieve information via the Internet by the general public.

6.4.4 Capability of automatically verifying the validity of internal and external links contained in the knowledgebase on a daily basis and notifying the Contractor of any invalid links. The link verification process shall not disrupt availability of the knowledgebase to end users.

#### C.6.5 Contact Management System

The Contractor shall provide a contact management system for capturing, tracking, assigning and managing all inquiries from initial contact through resolution, regardless of the access channel. The system shall include problem-tracking functionality and be capable of recording and generating records of problems reported via any channel, tracking the problem through to resolution, and maintaining historical data on problems by caller, tracking identification number, and by problem category and frequency. The system shall have the capability to capture blended channel communications in a single customer record. The system shall be available to all ISs for inquiry and real-time update as appropriate. The Contractor shall provide summary and detailed system and management data via secure web access. The system shall be capable of automatically extracting the relevant information from electronic inquiries populating the corresponding database fields via the use of XML.

The Contractor-provided contact management system must have the capability to track a wide range of data and activities, including personal data and customer demographic, contact logging and interaction, nature of inquiry and disposition, and inquiry tracking information. Specific requirements to be supported will be identified in individual task orders.

The Contractor-provided inquiry tracking and management system shall provide functionality including, but not limited to the ability to:

6.5.1 Capture, record, and document all customer inquiries and responses made to those inquiries whether via telephone, facsimile, E-mail, written correspondence, or any other communication channels supported. This includes date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action. The system shall also identify whether the inquiries are resolved by the Contractor or forwarded to Government personnel for resolution.

6.5.2 Retain a history of customer inquiries, interactions, and responses.

6.5.3 Support reporting requirements that include data and management information analysis. Incorporate multiple sorting and reporting alternatives including, but not limited to: by case number, by caller name, by applicant name, by date, by disposition code, by inquiry type, by program, by method of inquiry receipt, by method of inquiry response, by frequently asked question (FAQ).

6.5.4 Provide the Government with the capability and support required to ensure uninterrupted access to the application outside of scheduled system maintenance periods.

#### C.6.6 Workforce Management System

The Contractor shall provide a multi-channel workforce management system that will enable management personnel to analyze historical work volume, employee availability and schedule preferences, and trends to accurately forecast and schedule staffing resources to meet work volume requirements. The system shall be able to generate staff shift schedules based on traffic, staff availability, and service objectives. The system shall have the capability to optimize the schedule for skill-based routing.

#### C.6.7 Customer Survey Automation

The Contractor shall provide the capability to survey callers in an automated fashion for purposes of customer satisfaction assessment. The system shall provide the means to capture and transcribe the comments for analyses. The system shall be capable of capturing, storing, aggregating, and reporting survey results. All surveys shall be conducted in accordance with rules prescribed by the Government as defined in individual task orders (e.g. no surveying of calls placed for emergency purposes, surveys not offered to the same caller more than x times in x months).

#### C.6.8 Compliment and Complaint Management

The Contractor shall provide an automated capability to gather and report on customer complaints, compliments, and other service related comments/suggestions. The system shall provide the means to capture and transcribe the comments for analyses

#### C.6.9 Service Monitoring and Quality Control

The Contractor shall provide the capability for performance monitoring from a remote location. Supervisory and quality control personnel shall be able to monitor the performance of the ISs without plugging into the IS telephone sets. The monitoring system shall allow for silent monitoring both with and without tone indication to the IS during monitoring. The system shall have the following capabilities:

6.9.1 Monitoring sessions that can be scheduled and recorded for later review by supervisory and quality assurance personnel

6.9.2 Monitoring system that can record the voice and data portions of the transaction

6.9.3 All calls recorded for quality monitoring purposes shall be retained for a 90-day period, at a minimum, and permit tracking of IS actions in securing the response. The monitoring mechanism should permit calls recorded in sufficient quantity to allow for random selection of calls for review..

6.9.4 Remote access for monitoring by authorized Government personnel.

#### C.6.10 Training

The Contractor shall provide audio and visual equipment, computer workstations and servers, and other training aids to facilitate training of contractor staff.

#### C.6.11 Literature Fulfillment

The contact center system shall be capable of generating transactions fulfilling information requests (e.g., postal mail, E-mailing or facsimile of forms or information booklets) and relevant communications with customers. The system used for this function shall incorporate an alert process that notifies the appropriate resource to open and process requests as they are received. The contact center shall use laser-quality printers to provide the capability to print letters, product information, or other relevant information in black and white and/or in color. Contractor shall also be capable of electronically tracking the request through fulfillment.

#### C.6.12 Voice Mail and Electronic Mail

The contact center system shall be equipped with voice-mail and electronic mail capabilities to support internal and external communications. The Contractor shall provide E-mail accounts and addresses and Internet access for receiving and responding to customer inquiries at the contact center.

#### **C.6.13 Online Ordering System**

The Contractor shall provide a reliable, scalable, and secure Online Ordering solution that the Government can link to from subscribing websites to allow users to order products and services from the Government. The user interface shall be user friendly, be configurable to provide similar look and feel as the subscribing website, be compatible with commonly used browsers, and be Section 508 compliant. At a minimum, the contractor online ordering system shall have the following capabilities:

- Ability to capture and store user-entered data in Government-specified formats and deliver batch orders to Government-specified location via secure protocol on a scheduled basis.
- Ability to post orders/reports via a secure FTP site.
- Provides a shopping cart feature to enable user to review order information, delete items and/or change quantities before submitting the order.
- Ability for user to easily print order receipt.
- Provides address verification and can automatically correct addressing mistakes made by the user.
- Ability to assigns unique order ID to each order.
- Allows inventory reports to be generated at any time
- Accepts payments through commercial credit cards in a secure manner

#### **C.6.14 Web Chat System**

The Contractor shall provide a reliable, scalable, and secure Web Chat solution that the Government can link to from subscribing websites to access real-time web chat service.

The user interface shall be user friendly, be configurable to provide similar look and feel as the subscribing website, be compatible with commonly used browsers, and be Section 508 compliant. The services shall enable an IS to provide near real-time assistance to multiple users at the same time span. At a minimum, the contractor web chat system shall have the following capabilities:

- Ability to route inquiries to specific queue based on agent skills.
- Ability to push active web pages to end users
- Allows IS to guide end users through a website or application.
- Provides access to knowledgebase and preformatted responses to facilitate inquiry response
- Allows users access to knowledgebases to enable them to find answers while waiting in queue
- Provides automated greetings and responses
- Provides real-time monitoring capability
- Ability to track response and transaction time for each session and exchange
- Provides real-time and historical management reports on chat sessions and activities



- Ability to send copy of the session transcription via e-mail to the user and/or the Government
- Ability to enable users of the chat service to copy and/or print the content of the entire chat session onto an electronic or print media.

#### **C.6.15 Power Supply**

The Contractor shall provide emergency electrical power generation capability, as well as an uninterruptible power supply (UPS) to ensure continuity of contact center operations. The UPS shall be capable of protecting systems from voltage lags, over-voltage conditions, line frequency fluctuations, and power blackouts. It shall be capable of sustaining operations in the event of loss of normal sources of power until the backup generators can come online. The backup generator shall be capable of sustaining full contact center operation for a minimum of 24 hours. The transition from normal to emergency to backup power shall occur without loss of power to systems and without the disconnection of calls in process, loss of data, or customer calls queued for service.

#### **C.6.16 Database Design**

All database design shall conform to industry standards and conventions and shall be capable of sharing data with other Government/contractor systems through the use of XML. Any such databases shall be capable of sustaining a heavy query transaction load without impacting required system response requirements. These databases shall be designed and implemented to provide continuous read/write access during the Project required availability times. Maintenance cycles may restrict access as long as they are of short duration, scheduled outside of normal business hours and coordinated and approved by the Government.

### **C.7 TELECOMMUNICATIONS SERVICES TO BE PROVIDED**

#### **C.7.1 Local Telecommunications Services and Internet Access**

The Contractor shall provide the required local exchange carrier (LEC) and Internet access services to meet task requirements.

#### **C.7.2 Intercity Telecommunications Services**

The Government may provide its own intercity telecommunications services as Government Furnished Equipment or request the Contractor to provide the services as part of the overall solution.

Government furnished intercity telecommunications services may include domestic and international toll-free services and outbound intercity telecommunications and dedicated transmission services (between the contractor facility and Government location(s)) furnished through the Federal Government's long distance carrier and other contracts. Dedicated transmission services between contractor facilities shall be provided by the Contractor. Intercity telecommunications services provided by the Government may include the following features:

- Domestic and international toll-free services with nation-wide single number coverage and call routing features (e.g. area code routing, time of day and day of week routing, percent allocation routing, area code routing, allocation routing, alternative routing)
- Call termination features (e.g. network call transfer, dialed number identification service (DNIS))
- Automatic number identification (ANI)

- 2544      ○ Automated voice response service (e.g. IVR, voice recognition)
- 2545      ○ Outbound long distance service
- 2546      ○ Management reports

2547  
2548 When requested, the Contractor shall provide the necessary intercity telecommunications services to meet  
2549 the needs of the Government. At a minimum, the Contractor shall provide services and features  
2550 equivalent to those described in this section. The Contractor shall price telecommunications services  
2551 separately in Section B to enable the Government to select the optimum solution. The Government may  
2552 change service provider at any time during the effective period of a task order if such a change is in the  
2553 best interest of the Government. The Contractor will be notified in writing if such a change is to occur.

### 2554 2555 **C.7.3 Network Design**

2556  
2557 The Contractor shall be responsible for the overall network design, traffic engineering, and meeting the  
2558 interface requirements of all telecommunications and Internet access services needed to sustain both the  
2559 voice and data requirements of the contact center operations. This requirement includes supporting data  
2560 transmission between the Contractor and Government systems and appropriate security mechanisms to  
2561 protect sensitive data.

### 2562 2563 **C.7.4 Network Termination Equipment**

2564  
2565 The Contractor shall provide any equipment necessary to terminate the telecommunications and Internet  
2566 access services to the contact center, including any inside wiring and connectors between the network  
2567 service demarcation point and the contact center system.

### 2568 2569 **C.7.5 Service Coordination**

2570  
2571 The Contractor shall be responsible for coordinating with the Government's telecommunications  
2572 contractors and/or other telecommunications service provider(s) for service provisioning, trouble  
2573 resolution, and service restoration.

### 2574 2575 **C.7.6 Telephone Number Ownership**

2576  
2577 The Government may furnish its own toll-free telephone number(s) for use by the Contractor or request  
2578 the Contractor to provide the toll-free telephone number as part of the solution. The Contractor shall  
2579 expedite transfer of all toll-free telephone number(s) used to support tasks issued under this contract to the  
2580 Government at the conclusion of each task.

### 2581 2582 **C.7.7 Internet Domain Ownership**

2583  
2584 The Government may furnish its own Internet domain(s) for use by the Contractor or request the  
2585 Contractor to provide the Internet domain(s) as part of the solution. The Contractor shall expedite  
2586 transfer of all Internet domain(s) used to support tasks issued under this contract to the Government at the  
2587 conclusion of each task.

## 2588 2589 **C.8 Human Resources Management**

2590  
2591 The Contractor shall develop and implement an effective Human Resources Management program to  
2592 support recruitment, training, and retention of qualified personnel needed to meet task requirements. The

Contractor shall schedule and manage the contact center workforce to ensure adequate staffing is available to meet workload requirements.

#### C.8.1 Recruitment and Retention

The Contractor shall develop and implement an effective program to ensure timely recruitment and long term retention of qualified personnel to support task order requirements. At a minimum, the program shall address corporate human resources support, recruitment sources, testing and qualification processes, retention techniques and incentives, and employee satisfaction.

#### C.8.2 Training

The Contractor shall develop and implement a comprehensive training program that shall ensure that contact center staff provides superior levels of customer service across all customer access channels. Training courses shall provide participants the opportunity to develop skill levels in comprehensive customer contact and subject knowledge, and shall be provided through both classroom instruction and technical on-the-job training.

On a task order basis, the Government and the Contractor shall work together to jointly develop initial training. The Government will provide content-unique and organization-specific material as part of initial training. The Contractor shall provide customer service skills, equipment, database(s), and policy/procedure training. The duration of the training will vary depending on the task requirements. The training shall be both classroom and hands-on, computer-based and should include, at a minimum, working with databases and applicable Government furnished systems. The training shall be conducted at the Contractor's facility, and the Contractor shall bear all related costs.

##### C.8.2.1 Training Curriculum

Contractor shall construct training coursework and materials to address specific learning objectives of various groups. All training coursework and materials are to be approved by the Government prior to presentation to contractor personnel. The training curriculum shall include the following minimum components:

**C.8.2.1.1 Information Specialists** – Training programs shall be developed from the premise that all new staff has little or no contact center experience. The courses shall provide participants the opportunity to develop skill levels in telephone etiquette, listening, problem-solving, verbal and written communication, managing stress, working in teams, and other course modules related to foundational customer contact and human interaction skills. The Contractor shall ensure that ISs are adequately trained in the handling of calls from: non-English speaking individuals; individuals who are hearing, speech, or visually impaired; individuals with low literacy ability; irate and/or abusive callers; callers in crisis situations; and any other caller diversity issues that may be identified. In addition, training shall be developed to educate ISs in the terminology, services, laws and regulations (e.g., Privacy Act), systems, and protocols specific to the task requirements.

**C.8.2.1.2 Leadership** – Courses shall provide participants with an overview of project goals and objectives, performance goals (e.g., quality, and productivity) and contact center management (e.g., operations, and service level). Participants shall be provided the opportunity to develop skills in coaching, team-building, time management, problem solving, and other course modules related to human performance management. In addition, training shall be developed to educate the leadership team in the terminology, services, systems, and protocols specific to the task requirements.

C.8.2.1.3 *Support Personnel* – Courses shall provide participants with an overview of project goals and objectives. Participants shall be provided the opportunity to develop specific skills relating to their areas of expertise including, but not limited to, supervision, training, quality, service level management, and technical support. In addition, training shall be developed to educate support personnel in the terminology, services, and protocols specific to the task requirements.

Contractor shall also include enhanced training modules to inform staff of Government organizational structure and agency missions, applicable laws and regulations, new or modified programs and/or service offerings specific to the task requirements.

#### **C.8.2.2 Training Facilities**

Contractor shall provide all training facilities, computer terminals (including desktop content, functionality, and connectivity), audio and visual equipment, and other materials/supplies necessary for training as well as appropriate workspace for students. The Contractor shall design the training facilities to provide training in an effective and efficient manner. The Contractor shall provide the storage space for all course materials and references.

#### **C.8.2.3 Instructor and Classroom Criteria**

The Contractor shall provide certified instructors to deliver all training provided under this contract. The training is to be provided at Contractor-provided facilities that are designed for optimum learning with effective student-to-instructor ratio and class size limits.

Government personnel will be available during start-up to provide content knowledge training for the start-up ISs and/or conduct train-the-trainer style learning sessions with Contractor's training instructions for course modules. Additionally, the Government may make personnel available to provide initial and/or regularly scheduled (e.g., biannual) task-specific training sessions with Contractor's staff.

#### **C.8.2.4 Course and Reference Materials**

The Contractor shall develop the course materials based on relevant information and materials provided by the Government, including but not limited to, program background, laws and regulations (e.g., Privacy Act), services, work types, policies and procedures, and related systems. Specific materials to be provided will be included in individual task orders. Contractor shall develop or revise training materials as necessary to accommodate such changes, keeping all training materials up-to-date for the duration of the contract. All training coursework and materials are to be approved by the Government prior to presentation to contractor personnel.

Contractor shall ensure that updates to training materials are carried over to applicable ancillary reference materials, job aides and supporting processes inclusive of contact center operations, quality assurance, and information systems (e.g., Contractor-provided knowledge database).

Prior to task implementation, Contractor must provide the Government with a copy of task-specific training materials for review and approval and with a copy of all other training materials to be delivered under a specific task order for review only. Contractor shall provide a copy of the most recent training materials upon request by the Government at any time during the performance of the task.

#### **C.8.2.5 Reporting and Recordkeeping**

The Contractor shall maintain a comprehensive list of contact center employees who have received training and/or obtained certification, including the frequency of training, types of training, and results of

training. The Contractor shall maintain copies of all training records and reports for the duration of the contract.

#### **C.8.2.6 Training Metrics and Analysis**

The Contractor shall provide training metrics and analysis, including, but not limited to the following tasks:

- Measure IS classroom training performance by a combination of written tests and job-simulated exercises at the level of baseline performance goals for new ISs and target performance goals for experienced ISs.
- Analyze the results of IS training performance measures.
- Measure training effectiveness and performance of the instructor(s) by third party analysis or student survey.
- Revise the training program based on the results of IS and instructor performance metrics, focusing on those ISs for whom additional/modified training may be indicated.

### **C.9 QUALITY ASSURANCE/QUALITY IMPROVEMENT**

The Contractor shall develop, implement, and manage a Quality Assurance/Quality Improvement Program to ensure that services delivered comply with the performance standards specified by the Government. The program shall include on-site and remote service monitoring capabilities and performance analysis to support planning and operation of the contact center on an ongoing basis. The program shall also include regular call calibration sessions to ensure all its quality professionals define and perceive customer interactions in the same way. Calibrated quality professionals shall monitor each full time IS assigned to specific programs a mutually agreed upon number of times and shall prorate monitoring sessions for part time employees so that they receive the same level of monitoring as do full-time employees. For each IS, quality professionals shall schedule monitoring sessions at various times of the day and various days of the week to ensure a fair representation of IS performance (e.g., monitoring back-to-back calls for a single IS would not be acceptable). The Contractor and the Government will mutually agree upon the criterion for calibration. Upon task order award, the Government and Contractor shall schedule and conduct calibration sessions to reach the acceptable criterion for calibration. Evaluations conducted by quality professionals shall be available to the Government both in an individual and an approved consolidated report format. The Government requires that Contractor documents in detail the data, results, conclusions, recommendations, action plans, and improvement priorities identified as a result of quality monitoring. Contractor shall ensure legal and regulatory compliance concerning notification and consent when monitoring calls for quality purposes and shall verify that call monitoring complies with all applicable Federal, State, and local laws and statutes.

#### **C.9.1 Service Monitoring and Calibration**

The Contractor shall provide on-site and remote service monitoring and performance analysis to support planning and operation of the contact center. Contractor shall develop a comprehensive service monitoring plan, including, but not limited to, the following components:

Monitoring processes - Contractor shall develop and implement a continuous performance-monitoring program to ensure that ISs are performing in accordance with the performance standards defined by the Government as specified in individual task orders for all communications channels. Contractor shall

devise methods for: capturing time, date, application name, and comments for the inquiries monitored; tracking and trending by IS, supervisor, manager, and application; reporting for training need, individual and operational performance issues, and hiring considerations; and communicating monitoring results to ISs and other operational areas within the contact center to ensure continual performance and process improvement. At the request of the Government, monitoring sessions may be held jointly.

Monitoring system - Contractor shall utilize an automated inquiry monitoring and recording system with remote access. The Contractor shall have the capability to monitor both voice and data capabilities. Should data capabilities not be available, a description will be required to explain how the Contractor monitors and evaluates the accuracy of information both provided and recorded by the ISs. The Government reserves the right to remotely monitor Contractor's ISs at anytime without pre-arrangement and to contract with a third party to remotely monitor Contractor's ISs. The Government will provide input to the Contractor concerning remotely monitored inquiries.

Calibration - Contractor shall ensure all its quality professionals define and perceive customer interactions in the same way. Calibrated quality professionals shall monitor each full time IS assigned to specific programs a mutually agreed upon number of times and shall prorate monitoring sessions for part time employees so that they receive the same level of monitoring as do full-time employees. For each IS, quality professionals shall schedule monitoring sessions at various times of the day and various days of the week to ensure a fair representation of IS performance (e.g., monitoring back-to-back calls for a single IS would not be acceptable). The Contractor and the Government will mutually agree upon the criterion for calibration. Upon task order award, the Government and Contractor shall schedule and conduct calibration sessions to reach the acceptable criterion for calibration.

Continual process improvement - To improve operations, Contractor shall develop and implement action plans based on analysis of monitoring results. These plans shall be available to the Government for review upon request. In addition, evaluations conducted by quality professionals shall be available to the Government both in an individual and an approved consolidated report format. The Government requires that Contractor documents in detail the data, results, conclusions, recommendations, action plans, and improvement priorities identified as a result of quality monitoring.

The Government will work closely with the Contractor to determine which customer calls shall be recorded for monitoring purposes.

### **C.9.2 Effectiveness of Service Delivery**

The Contractor shall provide measurements and analysis of the effectiveness of service delivery including, but not limited to:

*C.9.2.1 Accuracy of information provided* – Perform regular assessments of the accuracy of information provided by ISs to the inquirers. Such assessments shall be conducted through regularly-scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments to the Government in accordance with task order reporting requirements.

*C.9.2.2 Accuracy of information recorded* – Perform regular assessments of the accuracy of data and information collected and recorded by ISs. Such assessments shall be conducted through regularly-scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments to the Government in accordance with task order reporting requirements.

*C.9.2.3 Customer satisfaction assessments* – Design develop, and implement customer satisfaction surveys in conjunction with Government personnel to measure the performance level of the Contractor-

provided services. Obtain all appropriate approvals in compliance with Federal regulations and statutes prior to initiating any survey activities. The Contractor shall use the results of the customer satisfaction assessment to determine customer perceptions about the quality of the service delivery, IS system performance, and the overall process of service fulfillment. Contractor shall use these results to develop and implement action plans to continually improve customer satisfaction, and shall provide the results of both the survey and action plans to the Government for review upon request.

**C.9.2.4 Employee satisfaction assessments** – Develop and implement a continuous program both to monitor employee satisfaction, assess employee job needs, and to determine employee perceptions about the quality of the support provided by Contractor and the operational environment. Provide the results of the assessments (including prioritized recommendations) to the Government for review upon request and cooperate with the Government to devise action plan to target any suggested improvements, including required actions, responsibilities, and timeframes.

### **C.9.3 Quality Improvement Program**

The Contractor shall develop, implement, and manage a Quality Improvement Plan that incorporates customer-focused initiatives into the contact center solution, including, but not limited to:

**C.9.3.1 Compliment and complaint management** – Contractor shall have an automated Compliment and Complaint Management process to capture customer service information regarding areas of service issues and customer need. Contractor shall compile and analyze such data, identifying market opportunities or opportunities for improvement where appropriate, and reporting such information to the Government on a monthly basis.

**C.9.3.2 Employee suggestions** – Contractor shall conduct regular surveys to collect ideas from ISs for improving customer satisfaction. This input shall be provided to the Government on a monthly basis. The Government will use this information in their efforts to improve customer satisfaction. For those areas related to Contractor's performance, Contractor shall develop and implement action plans to continually improve customer satisfaction and shall make these plans available to the Government upon request.

**C.9.3.3 External operational assessments** – Contractor shall permit the Government, and/or a Government authorized third party, to conduct, at the Government's expense, operational assessments of Contractor's operations to determine the quality of service delivery, the quality of IS system performance, and the efficiencies of the operations. Operational assessment includes a validation and an audit of the contact center. It may include organizational and training assessments as well as other task-related activities performed by the Contractor. The purpose of these assessments is to gain information concerning the operation, identify opportunities to support improvements of contact center operations, and opportunities for the Government to support Contractor. The Contractor shall cooperate fully in any such review, provide the Government (or designated third party) with information, and explain Contractor's procedures and operations to the Government, if necessary. The Government will provide Contractor feedback on the results of any operational assessments. The Government and Contractor shall identify high-priority recommendations, and cooperate to develop and implement action plans that target high-priority improvements.

## **C.10 PERFORMANCE MANAGEMENT**

The Government intends to establish performance standards that will be used to measure contractor performance and a methodology for calculating incentive awards for superior performance on a task order-by-task order basis. The Government will consult the Citizen Services Level Committee (CSLIC)

report "Proposed Performance Measures, Practices and Approaches for Government-wide Citizen Contact Activities when developing individual task order performance standards. Specific performance standards, incentive award schedule, and methodology for calculating incentive award amount will be identified in individual task orders issued by the Government. The Contractor is expected to work with the Government to develop plans and procedures for implementing new or revised performance standards.

## **C.11 MANAGEMENT REPORTS**

The Contractor shall provide for the automatic generation of comprehensive, accurate, easy to understand, and timely reports. The Government intends to request and receive only those reports that provide insight to the Contractor's level of performance in meeting contractual requirements and satisfying customer needs. The Government may also request the Contractor to provide management and operational reports on an ad hoc basis for purposes of gaining insight to specific program and customer service needs. The Contractor shall provide management reports via e-mail or a secure web site for remote access and download via the Internet. Access to these reports shall be controlled via User Identification Code and Unique Password. When requested by the Government, the Contractor shall provide these reports in electronic and/or hard copy format. Specific report formats, content, frequency, and delivery methods of all reports shall be coordinated with and approved by the Government on an individual task order basis.

### **C.11.1 Weekly and Monthly Status Reports**

At a minimum, the Contractor shall provide weekly and monthly status reports. These reports shall be brief, factual, and shall include, but not be limited to:

Management summary - shall document major events or problems and progress in their resolution.

Continual improvement opportunities - shall document input received from Contractor's ISs concerning ideas for improving customer satisfaction.

Narrative - shall describe work performed during the reporting period and work expected to be performed in the next reporting period, including assessment of Project status against schedule/plan, discussions of any problems, issues, change requests, recommendations for correction, and variances between Contractor billed versus proposed pricing where applicable.

### **C.11.2 Operational Reports**

The Contractor shall provide operation reports that provide a recap of key contact center activities in support of each task. Reports shall provide information by individual programs and in aggregate.

Such reports shall provide detail sufficient to reflect the level of effort provided. The reports shall be supported with measurements occurring by second, minute, hour, or day, as appropriate. Activity reports shall include hourly, daily, weekly, monthly, and annual trending of key data elements in both tabular and graphic formats.

Specific data elements appropriate to each work type including responses handled via automated services, inbound and outbound calls, incoming and outgoing facsimiles, incoming and outgoing E-mail messages, incoming and outgoing written correspondence, volume of escalated inquiries, and hosted FAQ services activities shall be included. At a minimum, the reports shall provide all relevant information on volume and disposition of inquiries by work type, call origin by area code and/or geographic area if available, performance statistics (e.g., call attempts, blockage, speed of answer, abandonment rate, holding and call wrap-up time, etc.), and IS occupancy rate. Specific data elements, formats, and data collection and reporting intervals shall be coordinated and approved by the Government.



2894

2895 The Government reserves the right, during and for a 3 month period immediately after the Start-Up Phase  
 2896 of each task, or in cases of special circumstances/crisis situations, or non-performance, to request more  
 2897 detailed and more frequent reporting at no additional cost to the Government. In cases of non-  
 2898 performance, the Government may request such reports until such time as Contractor performance levels  
 2899 have stabilized and are in full compliance of contract requirements.

2900

### 2901 **C.11.3 Problem Resolution Reports**

2902

2903 In support of each task, the Contractor shall collect and compile a list of customer requests for  
 2904 information, services, or fulfillment literature that the Contractor is unable to answer or provide given the  
 2905 tools and data at its disposal. Such reports shall include both detailed and consolidated data and reference  
 2906 the specific information or item requested. The reports shall provide an explanation of how these  
 2907 inquiries were handled and/or resolved.

2908

### 2909 **C.11.4 Monitoring Reports**

2910

2911 In support of each task, the Contractor shall compile the results of call and work monitoring efforts  
 2912 including monitoring results, conclusions, recommendations, action plans, and improvement priorities.  
 2913 Such results should include both accuracy of information provided and accuracy of information recorded.  
 2914 These results shall be available in both individual and consolidated report formats.

2915

### 2916 **C.11.5 Compliment and Complaint Management Reports**

2917

2918 In support of each task, the Contractor shall gather and report customer comments to the Government on a  
 2919 monthly basis. At a minimum, this report shall include a categorization and tally of comments received  
 2920 according to predefined disposition codes, verbatim customer comments as captured by the automated  
 2921 survey equipment or IS, or the actual document from which they were received, and an analysis and  
 2922 trending of the type and quantity of comments recorded over the life of each task.

2923

### 2924 **C.11.6 Ad Hoc Reports**

2925

2926 In support of each task, the Contractor shall provide up to twelve (12) ad hoc reports annually at no  
 2927 additional cost to the Government. Such requests will be initiated and approved by the Contracting  
 2928 Officer or his/her duly authorized representative. The Government reserves the right, during initial  
 2929 project implementation or in cases of non-performance, to request more detailed and more frequent  
 2930 reporting at no additional cost to the Government until the need for such reports subside or Contractor  
 2931 performance levels have stabilized and are in full compliance of contract requirements.

2932

## 2933 **C.12 GOVERNMENT FURNISHED PROPERTY**

2934

2935 The Government will furnish pertinent information to the Contractor for use in the performance of each  
 2936 task. Examples of information that may be provided by the Government include, but are not limited to,  
 2937 the following:

2938

- 2939 ○ Privacy Act guidelines
- 2940 ○ Escalation procedures and guidelines
- 2941 ○ Business rules and/or response formats and guidelines

- 2942      ○ General Government and program specific training materials
- 2943      ○ Existing methods and procedures manuals
- 2944      ○ Government agency contact listing
- 2945      ○ Government travel guidelines
- 2946      ○ Contact listing for Congressional and Diplomatic offices
- 2947      ○ Existing script or call guides as presently used to support current agency programs
- 2948      ○ Federal information systems security guidelines
- 2949      ○ Screen layout and file structure for data transmitted by agencies
- 2950      ○ Access to Government databases where applicable
- 2951      ○ Public distribution materials (e.g., publications, applications, forms, brochures) where applicable.
- 2952      ○ Initial content for knowledge database
- 2953      ○ Conflict of interest guidelines
- 2954      ○ Relevant laws, regulations, policies and procedures
- 2955      ○ Reference materials
- 2956      ○ Database files
- 2957      ○ Envelopes and mailing supplies

2958  
2959 For any materials to be distributed to the inquiring public, the Contractor shall be responsible for stocking  
2960 adequate supply and submitting re-supply requests on a timely basis to ensure continuous availability.  
2961

### 2962 **C.13 DOCUMENTATION TO BE PROVIDED**

2963  
2964 The Contractor shall provide the documentation in accordance with the schedule set forth in task orders  
2965 issued by the Government. Identified below are some of the plans that the contractor is expected to  
2966 provide as part of the task deliverables. The Contractor shall review all plans on a continual basis  
2967 throughout the life of the contract in order to maintain their accuracy and appropriateness to the current  
2968 operating environment. Subsequent to their initial acceptance by the Government, any changes to these  
2969 plans shall require Government review and approval prior to their implementation. The Government  
2970 reserves the right to require additional documents to meet specific task requirements.  
2971

2972 C.13.1 *Conflict of Interest Compliance Plan* – identifies plans and procedures to identify, evaluate,  
2973 and mitigate all actual, apparent, and potential conflicts of interest that preclude or would appear to  
2974 preclude the Contractor from rendering impartial assistance or advice.  
2975

2976 C.13.2 *Customer Satisfaction Plan* – identifies plans and procedures to survey customers to  
2977 determine the degree of customer satisfaction on the services rendered. The plan shall include details on  
2978 the processes and methodologies that the Contractor will use to identify problems and implement  
2979 corrective actions.  
2980

2981 C.13.3 *Design, Engineering, Implementation and Management Plan* – includes the following:  
2982

2983 C.13.3.1 *Site Selection* – identifies processes, methodologies, and criteria used for site selection,  
2984 including those that affect staffing, foreign language support, and emergency/disaster recovery.

C.13.3.2 *Facilities* – identifies and defines the contact center design, including work and office space and training facilities.

C.13.3.3 *Technology* – identifies and defines the system architecture and configurations for both primary operation and backup systems, including those supporting automated and manual inquiry processing, workforce management systems, knowledge/inquiry tracking databases, quality monitoring and training systems, management reports and other support tools used to support the contact center operations. Defines the use of XML within the system architecture to maximize data sharing with other Government/contractor systems.

C.13.3.4 *Networks* – identifies and defines the telecommunications/Internet services and most cost effective network design for supporting the contact center operations.

C.13.3.5 *Operations* – identifies processes and procedures for managing automated and attended functions, automated voice response script design and maintenance, call routing design and management, workforce scheduling and management, and service delivery strategies.

C.13.3.6 *Disaster Recovery/Contingency Plan* – identifies every risk as well as the steps necessary to prevent it from happening in the first place. The plan shall include an alternate set of steps to minimize the impact should prevention fail. The plan must define backup and restoration processes and the precise steps to take to recover as quickly as possible, including recovery procedures for physical facility, voice, data, and desktop systems and applications, communications networks, electrical service, customer access points, partners and procedures and staff. The Plan shall define the roles and responsibilities of contractor personnel during contingent and disaster events, including plans for training the personnel to prepare them to respond to such events. The plan shall include implementation procedures to test and execute the plan on a regular basis to ensure preparedness for such events. The plan shall be developed in accordance with applicable agency IT Security Policy and NISI Special Publication 800-34, Contingency Planning Guide for Information Technology Systems.

C.13.3.7 *Human Resources Management Plan* – includes the following:

C.13.3.7.1 *Staffing* – identifies staffing resources for contact center operation and project management. The plan shall include a staffing chart that identifies the allocated resources (expertise and staff hours) needed to perform each of the required functions to support the project. The plan shall include relevant details on recruiting and retaining employees, workforce scheduling and workload management, supervision and quality monitoring practices. The Plan shall also address roles and responsibilities of project and contact center staff by title and define supervisor and Quality Assurance (QA) monitor to IS ratios that will be used in support of the task.

C.13.3.7.2 *Training* – identifies plans, procedures, and methodologies for training contact center employees, including the types and schedule of training to be provided, and criteria for selecting instructors and training evaluation assessment methods.

C.13.3.7.3 *Dismissal Procedures* – identifies procedures that the Contractor shall follow in the event of a Federal Government closure or other emergency affecting the area in which the contact center is located.

C.13.3.8 *Knowledge/Case Management Plan* – identifies methodologies, processes and procedures for effective knowledge management, including those required for developing, operating, and maintaining the required knowledge and case management databases to support the contact center operations. Where

appropriate, the plan shall include methodologies and procedures for effective management of distributed knowledge databases and sharing of knowledge/case management data with other Government and/or contractor systems.

C.13.3.9 *Operations Management Plan* – identifies plans and procedures for managing staff, facilities, equipment and processes effectively; includes procedures that the Contractor shall follow in the event of a service outage, an unexpected surge in call volume, a Federal Government closure or other emergency affecting the area in which the contact centers is located.

C.13.3.10 *Performance Management Plan* – identifies plans and procedures to measure any customer service performance standards deemed appropriate.

C.13.3.11 *Phase-In Plan* – identifies plans and approaches for implementing the proposed solution, including required tasks, schedule and milestones, and deliverables. The plan shall include methodologies and procedures for minimizing disruption of service to current customers.

C.13.3.12 *Program Management Plan* – identifies and defines the Contractor's organization, roles and responsibilities, and lines of authority, management procedures/policies/plans, plans and programs for managing team partners and subcontractors, escalation procedures for problem/dispute resolution, and reporting requirements for the tasks and services to be performed under this contract.

C.13.3.13 *Project Plan* – provides a comprehensive plan for implementing the project, which addresses all strategies, objectives, required actions, roles and responsibilities and target dates for implementation of tasks. Identifies critical paths and task dependencies.

C.13.3.7.14 *Quality Assurance/Quality Improvement Program Plan* – identifies plans, methodologies, and procedures for maintaining effective quality assurance and service improvement programs, including monitoring and assessing performance and service activities to ensure quality services are provided to customers. Included in the program shall be a Quality Improvement Plan to identify and document performance assessment and improvement opportunities and procedures for implementing the service improvements. The Plan shall address all areas, including, staffing, training, operations, contract deliverables, performance management, process engineering, service delivery, service improvements, and customer satisfaction.

C.13.3.7.15 *Security Plan* – provides an overview of the security requirements for the information and IT systems and describes the existing or planned controls (management, operational, and technical) for meeting those requirements. The Plan also describes the systems and delineates responsibilities and expected behavior of individuals who access the systems. The plan shall be developed in accordance with applicable agency IT Security Policy and NIST Special Publication 800-18, Guide for Developing Security Plans for Federal Information Technology Systems and other relevant publications.

C.13.3.7.16 *Service Level Management Plan* – identifies processes and methodologies for effective service level management, including workload forecasting, IS scheduling, service recovery (from system failures, disasters, etc.), problem identification and resolution, problem notification, and contingency planning and escalation.

C.13.3.7.17 *Test and Acceptance Plan* – identifies plans and procedures that the contractor shall use to ensure that the full range of services to be provided are successfully tested prior to actual implementation.

3086 C.13.3.7.18 *Value Engineering/Process Improvement Plan* – identifies plans and procedures to  
3087 evaluate new and emerging technologies and/or reengineering business processes to improve program  
3088 efficiency and customer service.  
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3090 Additionally, the Contractor shall obtain and provide all permits, contracts, copyrights, licenses, etc.,  
3091 necessary for its performance of any tasks issued under this contract and shall provide copies of such  
3092 information to the Government upon request.



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**SECTION D**

**PACKING AND MARKING**

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**D.1 PRESERVATION, PACKAGING AND PACKING**

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**D.2 PACKING LIST (GSAM 552-210-7) (APR 1984)**

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**D.3 FOB POINT**

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**D.4 SHIPPING INSTRUCTIONS**

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Unless otherwise directed by the Contracting Officer or the Contracting Officer's Technical Representative (COTR), all reports shall be submitted in accordance with Section F of the contract.





**SECTION E****INSPECTION AND ACCEPTANCE****E.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

This contract incorporates the following clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make a copy of the full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): <http://www.arnet.gov/far>.

**Federal Acquisition Regulation (48 CFR, APR 1984) Clauses**

Clause No.	Clause Title	Date
52.246-02	Inspection of Supplies - Fixed Price	AUG 1996
52.246-04	Inspection of Services - Fixed Price	AUG 1996
52-246-06	Inspection of Services Time and Materials and Labor Hour	MAY 2001
52.246-06	Inspection of Services Time and Materials and Labor Hour (ALT I APR 1984)	MAY 2001

**E.2 QUALITY CONTROL RESPONSIBILITIES****E.2.1 General**

The quality control of services provided under this contract shall be based on: (i) operational requirements and standards contained in this contract; (ii) work performance; and (iii) productivity requirements and standards, and (iv) data base information resource development and maintenance standards.

**E.2.2 Contractor Quality Control Responsibility**

The Contractor shall implement and adhere to the quality control plan provided as part of its Technical Proposal. The quality control plan shall be written by the Contractor's Quality Control Manager and approved by his/her immediate supervisor.

The Contractor is solely responsible for quality control of services that it provides. The Contractor's quality control program, which is embodied in the quality control plan, shall include, but not be limited to, the following. A monitoring and inspection system covering all the services listed in the Performance Requirements Summary. It must specify the elements of work performance to be monitored and inspected, either on a scheduled or unscheduled basis; the methods to be used; frequency of monitoring and inspection; the format and content of records and reports to be generated; and the title(s) of the individual(s) who will perform the monitoring and inspection. It shall include, but is not limited to:

- the method for identifying and preventing deficiencies in the quality of services performed before the level of performance can become unsatisfactory;
- the administrative procedures to be followed for reporting to the Contracting Officer's Technical Representative (COTR); and for responding to operational problems or complaints concerning work performance, qualifications, or other complaints about Contractor personnel; and
- preparation of system of on-site records of all inspections conducted by the Contractor and the corrective action(s) taken.

This documentation shall be available to the Government at all times during the term of the contract. The Contractor shall provide to the COTR a detailed monthly summary of all quality control actions, including descriptions of events which require quality control activity, and the corrective action taken.

### **E.2.3 Government Quality Assurance Responsibilities**

The Government will monitor the Contractor's performance using predetermined quality assurance surveillance procedures to examine and determine compliance with contract performance requirements. A copy of these procedures will be provided to the Contractor prior to the start of contract performance. In keeping with the Government's responsibility for quality assurance, the Government reserves the right to review all administrative, managerial, and statistical reports; telecommunications services; publicity materials and resource library materials using the Performance Requirements Summary. A copy of the Performance Requirements Summary will be provided to the Contractor prior to the start of contract performance. Final determination that reports, resource and publicity materials, and services rendered meet the requirements is solely the responsibility of the Government. All surveillance observations will be recorded by the Government. When an observation indicates defective performance, the Quality Assurance Evaluator (QAE) will request that the Contract Manager or designee initial the observation record. The Contractor shall, within 48 hours, notify the Contracting Officer, or his/her technical representative if so directed by the Contracting Officer, of the corrective action(s) taken in accordance with methods and techniques specified by the Contractor in its quality control plan. If the Contractor disputes any part of the QAE's observation, he/she shall request that the Contracting Officer hold a Performance Evaluation Meeting.

#### **E.2.3.1 Performance Evaluation Meetings**

The Contract Manager may be required to meet with the COTR, the QAE, and the Contracting Officer whether by telephone or at a designated Contractor-operated location on at least a weekly basis during the first month after the issuance of a Task Order under this contract. Meetings will be held as often as necessary thereafter at the discretion of the Contracting Officer or the COTR. However, a meeting will be held whenever a contract discrepancy report is issued. A mutual good faith effort will be made to resolve all problems identified.

The COTR will write the minutes of these meetings, and the minutes will be signed by the Contract Manager and the COTR. The attendee will, within three (3) business days, identify any areas wherein he/she does not agree by providing written notice to the COTR.

**SECTION F****DELIVERIES OR PERFORMANCE****F.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

This contract incorporates the following clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make a copy of the full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): <http://www.arnet.gov/far>.

**Federal Acquisition Regulation (48 CFR, APR 1984) Clauses**

Clause No.	Clause Title	Date
52.242-15	Stop-Work Order	AUG 1989

**F.2 PERIOD OF CONTRACT**

The contract becomes effective on Date of Award and continues in effect for a 2-year base period. In addition, the period of the contract is subject to four (4) two-year option periods at the prices provided for in Section B.

**F.3 OPTION TO EXTEND THE TERM OF THE CONTRACT**

The Government may exercise the options identified in Section F.2 by written notice to the Contractor within thirty (30) days prior to contract expiration. If the Government exercises this option, the extended contract shall be considered to include this option provision.

**F.4 SCHEDULE OF DELIVERABLES**

Within thirty (30) days after award of a contract, the Contractor shall provide to the Administrative Contracting Officer a fully redacted version of the contract, including all documents that are incorporated by reference on the Standard Form 26. The Contractor shall provide a camera-ready redacted copy and a matching copy that highlights the portions that have been redacted. Both copies must be in electronic format, and will be provided on the same CD- ROM. The Contractor must work diligently with the ACO until the Government and Contractor can agree upon all redacted material.

The Contractor shall provide the required deliverables based on the schedule identified in individual task orders issued by the Government. Specific means and format of deliverables will be specified in individual task orders.

**F.5 CONTRACT DELIVERABLE ACCEPTANCE**

Any contract documentation deliverable produced under this contract will be accepted or rejected in writing by the Government. Unless otherwise specified in the task order, the Government will have up to ten (10) working days to review the deliverable and provide comments. During this review period, the Government will have the right to reject or require correction of any deficiencies found in the deliverable that are contrary to the information contained in the Contractor's accepted proposal. After receiving the comments, the Contractor shall incorporate the changes into the deliverable and resubmit the final

3246 deliverable to the Government for approval. After final submission, the Government will have ten (10)  
3247 working days to approve the final submission.  
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3249 If the Government fails to complete the review within ten (10) working days after receiving the  
3250 deliverable, the deliverable will become acceptable on an interim basis. If deficiencies are discovered  
3251 after this period, the Government will provide in writing a description of all discrepancies to be corrected  
3252 by the Contractor. After receiving the description of the discrepancies, the Contractor shall incorporate  
3253 the changes into the deliverable and resubmit the deliverable to the Government. If the Government fails  
3254 to respond within ten (10) working days of the final submission, the submission will be considered  
3255 accepted.

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## SECTION G

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### CONTRACT ADMINISTRATION DATA

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#### **G.1 CONTRACT ADMINISTRATION**

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Notwithstanding the Contractor's responsibility for total management during the performance of the contract, the administration of the contract will require maximum coordination between the Government and the Contractor. The following sections describe the roles and responsibilities of individuals who will be the Government and Contractor points of contact.

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##### **G.1.1 Procuring Contracting Officer**

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During the solicitation phase of this procurement, which is up to and including contract award, the Procuring Contracting Officer (PCO) is the Government's sole point of contact. The person designated as PCO for this procurement is Mr. Robert H. Corey. All documents and issues concerning the procurement should be provided to Mr. Corey at the following address:

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3273

General Services Administration

3274

Office of Chief Acquisition Officer

3275

Operational Contracting Staff (VC)

3276

1800 F Street NW (Room G127)

3277

Washington DC, 20405

3278

Attention: Mr. Robert H. Corey

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Mr. Corey's telephone number is (202) 501-1797; his facsimile number is (202) 501-4281; and his e-mail address is: bob.corey@gsa.gov.

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##### **G.1.2 Administrative Contracting Officer**

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After contract award, Mr. Corey will appoint the General Services Administration Administrative Contracting Officer (ACO) by written notice to the Contractor. Upon appointment, the ACO will become the Government's sole point of contact. The ACO is responsible for administration of the contract. The right to issue contract modifications to the terms and conditions of the basic contract that is within the scope of that contract, to terminate the contract, to exercise option renewals, and to approve subcontractors will be delegated in writing to the ACO.

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Communications pertaining to contract administration matters shall be addressed to the ACO. The ACO will be the only person authorized to make or approve changes in any of the requirements of this contract, and, notwithstanding any provision and/or clause contained elsewhere in the contract, said authority will remain solely with the ACO. In the event that the Contractor makes any change in the contract price, the Performance Work Statement, or any other contract terms and conditions at the direction of any person other than the ACO, such change shall be considered to have been made without authority, and no adjustment shall be made in the contract price to cover any increase in costs incurred as a result thereof.

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When necessary, the ACO will:

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- o Serve as liaison between the Contractor and Using Agencies

- 3302      ○ Assist in expediting orders
- 3303      ○ Ensure compliance with contract requirements
- 3304      ○ Issue final decisions and handle all disputes under the Contract Dispute Act
- 3305      ○ Delegate contracting authority to a Federal Department, Agency, or Other Authorized Entity
- 3306      (“Using Activity”) Contracting Officer for the purposes of requesting quotes and awarding task
- 3307      orders and subsequent task order modifications under this contract.
- 3308

3309      **G.1.3 Task Order Contracting Officer (TO/CO)**

3310      Subsequent to contract award, task order requests will be issued primarily by the ACO. GSA may,  
3311      however, delegate contracting authority to a Using Activity’s contracting officer to request quotations  
3312      directly from USA Contact Contractors, and to award task orders and modifications to task orders under  
3313      the appropriate indefinite-delivery, indefinite-quantity contract. The Contracting Officer who is  
3314      responsible for issuing a Request for Quotation (either the ACO or a Using Activity Contracting Officer)  
3315      becomes the cognizant Contracting Officer for that requirement, and, therefore assumes the title of Task  
3316      Order Contracting Officer (TO/CO). The TO/CO is the Government’s single point of contact for each  
3317      task order issued by that TC/CO. The TO/CO is responsible for administration of the task order, issuance  
3318      of task order modifications, authorizing changes in terms and conditions of the task order, terminating the  
3319      task order, exercising option renewals, and approval of subcontractors.

3320

3321      The Activity Contracting Officer will be appointed as a TO/CO in writing by the ACO. A copy of each  
3322      appointment letter will be provided to all USA Contact Contractors. Contractors are cautioned that,  
3323      unless they are in receipt of an appointment letter signed by the ACO, they should take no action in  
3324      response to a Request for Quotation which has been identified as a requirement under the USA Contact  
3325      program. Instead, the Contractor shall immediately notify the ACO, and provide him/her with the details  
3326      of the request.

3327

3328      Communications pertaining to task order administration matters shall be addressed to the TO/CO. The  
3329      TO/CO will be the only person authorized to make or approve any changes in any of the requirements of  
3330      the task order for which he/she is responsible. In the event that the Contractor makes any changes at the  
3331      direction of any person other than the TO/CO, such change shall be considered to have been made  
3332      without authority, and no adjustment shall be made in the task order price to cover any increase in costs  
3333      incurred as a result thereof. When necessary, the TO/CO will:

- 3334
- 3335      ○ Serve as liaison between the Contractor and Using Agencies
- 3336      ○ Assist in expediting orders
- 3337      ○ Ensure compliance with task requirements
- 3338      ○ Issue final decisions and handle all task order disputes under the Contract Dispute Act
- 3339

3340      **G.1.4 Contracting Officer’s Technical Representative**

3341      The TO/CO will appoint a Contracting Officer’s Technical Representative (COTR) to ensure orderly  
3342      performance of this contract and subsequent task orders. Appointment of the COTR will be made in  
3343      writing upon contract/task order award. A copy of the appointment letter will provided to the task order  
3344      Contractor.

The COTR is authorized to be the technical point of contact under this contract; however, the Contractor shall direct all inquiries of either a technical or a non-technical nature through the TO/CO.

The types of actions within the purview of the COTR's authority include:

- Ensuring that the Contractor performs the technical requirements of the contract;
- Conducting or causing to be conducted inspections necessary in connection with performance of the contract;
- Monitoring the Contractor's performance under the contract, and notifying the Contractor and TO/CO of any deficiencies observed;
- Coordinating Government-furnished property availability (if required); and
- Providing for site entry of Contractor personnel if required.

The COTR may provide technical direction and general performance-related guidance to the Contractor. As used herein, "technical direction" means direction to the Contractor that fills in details, suggests possible lines of inquiry, or otherwise completes the general scope of the work. "Technical direction" must be within the terms of this contract; shall not change or modify the contract/task order in any way; and shall not constitute changes, as described in contract clause 53.243-1, Changes -Fixed Price or 52.243-3 Changes - Time and Materials or Labor Hour, which may only be accomplished by the TO/CO.

The COTR will provide no supervisory or instructional assistance to Contractor personnel. The COTR's responsibility is to provide Contractor access to working data, and to clarify technical requirements as necessary to ensure useful expenditure of Contractor effort. The COTR is not empowered to make any commitments or changes which affect the contract/task order price, other terms and conditions, or delivery provisions. Any such proposed changes must be brought to the immediate attention of the TO/CO for action. The acceptance of any changes by the Contractor without the specific approval and written consent of the TO/CO shall be at the Contractor's risk.

If in the Contractor's opinion, the COTR requests or indicates an expectation of effort which would justify or require an equitable adjustment to the contract/task order, the Contractor shall promptly notify the TO/CO in writing; however the Contractor shall take no other action on that request or effort until the TO/CO has issued a change or otherwise resolved the issue.

The COTR for the base contract award is:

Mr. Henry Lai  
Program Manager  
General Services Administration  
Office of Citizen Services and Communications  
Federal Citizens Information Center  
1800 F Street, NW  
Room G142  
Washington, DC 20405

Phone: (202) 821-7226  
E-Mail: henry.lai@gsa.gov

#### **G.1.5 Contractor's Points of Contact**

The Contractor shall provide an organizational structure for the management and administration of task orders under this program. The organizational structure shall include personnel to perform the following functions:

- Serve as the point of contact to interface with the Government (GSA and Using Agencies) on issues related to program administration
- Oversee the overall management and operations of services provided under each task order
- Serve as the point of contact to interface with the Government (GSA and Using Agencies) on major issues related to operational support and implementation
- Coordinate as necessary with the COTR, Using Agencies, and subcontractors in providing services under a task order
- Serve as the single point of contact to interface with the CO/COTR and meet with the Government (GSA and Using Agencies) on planning and operational issues related to classified requirements and/or problems, in the event of national security threats and/or disaster situations.
- All key personnel assigned by the Contractor to fulfill contract management and administrative functions shall be accessible to the Government (GSA and Using Agencies) 24 hours a day, 7 days a week by telephone, cellular telephone, Blackberry-type device, or pager. Lists of all Contractor points of contact shall be provided, including telephone, cellular telephone, and pager numbers and e-mail addresses. The Contractor shall provide the TO/CO with an updated list of all points of contact within five (5) calendar days after changes to the list.

#### **G.2 SERVICE ORDERING**

This contract will be used by the Government to provide complete managed multi-channel inquiry response and management solutions to support the USA Services project, including support for other E-Gov initiatives, and other Using Agency programs. Section C, the Performance Work Statement, establishes the overall scope of work that may be performed under this contract.

The Government will order services under this contract by means of task orders with specifically defined work requirements, deliverable products, performance standards, and schedules. The Contractor shall perform work under this contract only as directed in task orders issued by the TO/CO.

The Contractor shall provide the services and, if required, incidental supplies specified on each task order at the price set forth on each task order. Orders may be issued under this contract from date of each IDIQ contract award through the life of the contract. All task orders issued under this contract are subject to the terms and conditions of the contract. If there is a conflict between the terms and conditions of the contract and those of the task order, the terms and conditions of the contract shall prevail. All task orders issued prior to the end of the contract shall be honored and performed by the Contractor according to all terms and conditions of the contract, subject to the Government's rights and remedies thereunder. Copies of all task orders shall be maintained by the Contractor for the duration of the contract through final closeout.



### 3443 G.2.1 Fair Consideration Process

3444 When a requirement is identified by a Government agency, the TO/CO will issue a Request for Quotation.  
 3445 Requirements will be grouped together to the extent that it is practical to do so. All contract holders will  
 3446 be provided a fair opportunity to propose on all requirements in excess of \$2,500.

3447  
 3448 Contract holders need not be given an opportunity to be considered for a particular order in excess of  
 3449 \$2,500 when the TO/CO determines that:

- 3450
- 3451 ○ The need for services is of such urgency that providing a fair opportunity to all Contractors would
- 3452 result in unacceptable delays
- 3453
- 3454 ○ Only one such contract holder is capable of providing the services at the level of quality required
- 3455 because the services ordered are unique or highly specialized
- 3456
- 3457 ○ The order should be issued on a sole-source basis in the interest of economy and efficiency as a
- 3458 logical follow-on to a task already issued under the contract
- 3459
- 3460 ○ It is necessary to place an order to satisfy a minimum guarantee
- 3461

3462 Examples of exceptions include, but are not limited to, those described in the following table. These  
 3463 examples are provided only for purposes of illustration.

Table G.1. Exceptions to Fair Opportunity

Exception Provided for by 41 USC §253j [abbreviated description]	Examples of Task Order Types that Qualify As Exceptions
Unusual urgency that would lead to unacceptable delays	<ul style="list-style-type: none"> <li>○ Natural disaster or other emergency needs</li> <li>○ Military/mobilization needs</li> <li>○ Immediate short-term need arising on short notice</li> </ul>
Only one capable Contractor	<ul style="list-style-type: none"> <li>○ Only one Contractor offers the service</li> <li>○ Only one Contractor offers the service to the locations where the service is needed</li> <li>○ Only one Contractor can demonstrate that it is capable of providing service in the manner required by the user or to the required locations</li> </ul>
Economy, efficiency and logical follow-on to an order already issued under fair consideration	<ul style="list-style-type: none"> <li>○ Task orders associated with any moves, additions, changes, or similar needs</li> <li>○ Incremental task orders for the same or a new service to locations where service already exists or has been ordered</li> <li>○ Task orders placed to minimize inefficiencies or additional costs that would result from introducing multiple maintenance, operations, training network management, or other support systems</li> <li>○ Task orders placed to maintain the engineering and operational integrity of, or to augment an established telecommunications capability within an organization</li> </ul>
Meet a minimum revenue guarantee	<ul style="list-style-type: none"> <li>○ No examples provided.</li> </ul>

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 3467  
 3468 The TO/CO's source selection decision on each task order is final, and is not subject to the protest or  
 3469 disputes provisions of the contract, except for a protest asserting that the task order increases the scope,  
 3470 period, or maximum value of the contract. Disputes related to other matters affecting the task order  
 3471 award may be directed to the Ombudsman designated for this contract. The Ombudsman will be  
 3472 responsible for those duties described in FAR §16.505(b)(5). The Ombudsman for GSA is:

3473  
3474 Name: George N. Barclay  
3475 Title: GSA Service Order Ombudsman  
3476 Address: 1800 F Street, NW  
3477 Washington, D.C. 20405  
3478 Phone: (202) 501-2200  
3479

3480 The Government reserves the right to modify this fair consideration process, and will notify the  
3481 Contractors of any such modifications in advance of any task orders being placed using such a modified  
3482 process.  
3483

3484 **G.2.2 Task Order Request for Quotation**

3485 The normal method for issuing Requests for Quotation will be by electronic mail; however, the TO/CO  
3486 may choose to use postal mail or facsimile. Proposed contracting actions will not be synopsisized in  
3487 FedBizOpps per the exception at Federal Acquisition Regulation §5.202(a)(6).  
3488

3489 Contract holders will submit a task quotation to the TO/CO not later than ten (10) working days after the  
3490 issue date of the task request, unless a specific date is identified in the task request. All costs associated  
3491 with the development and presentation of the contract holder's quotation shall be borne by the contract  
3492 holder.  
3493

3494 If a contract holder needs a pre-quotation meeting, a request for such meetings shall be made to the  
3495 TO/CO not later than three (3) working days after receipt of the task request. All contract holders will be  
3496 invited to any such meeting unless the Request for Quotation is being issued under one of the exceptions  
3497 to the fair consideration process identified in paragraph G.2.1. If a pre-quotation meeting is held, the  
3498 quotation shall be submitted within ten (10) working days after the pre-quotation meeting.  
3499

3500 At a minimum, Requests for Quotation will contain the following information:

- 3501  
3502     o Performance Work Statement  
3503     o performance standards  
3504     o instructions on quotation preparation  
3505     o period of performance  
3506     o date, time and place for receipt of quotations  
3507     o method of evaluation (lowest price technically acceptable or best value)  
3508     o evaluation factors to be used.  
3509

3510 The offeror's quotation shall comply with the specific requirements of the Request for Quotation. As a  
3511 general rule, these requirements will include the following sections:  
3512

- 3513     o A narrative description of the plans for performance and technical approach, including a  
3514 description of the work and how it will be accomplished; qualitative descriptions of any  
3515 automated tools and any structured methodology proposed; and any potential risks or problem  
3516 areas.  
3517

- Identification of assumptions on the Contractor's part used in developing the technical or cost portions of the quotation.
- Definitions and schedules for milestones and deliverables products; description of acceptance criteria, including when and how the Contractor shall ensure each is met.
- A general work breakdown structure for accomplishing the task requirements and functions identified above, showing the skill level, number of people (full and part time, and indicating the number of hours for part time personnel), and the total hours that shall be applied to each period of time.
- Detailed discussion of any other overtime or other-than-normal work schedule hours that the Contractor may propose, or a Work Breakdown Structure for Fixed Price Task Orders.
- A detailed work breakdown structure for accomplishing the task requirements identified above, showing the skill level, number of people, and labor hours shall be applied to each milestone and deliverable product. The proposed staffing and work hours must be consistent with the Contractor's staffing plan, including a detailed rationale of how the skill level and number of people were determined, and how they will be utilized
- An affirmation that the fully burdened rates contained in Section B of this contract are ceiling price rates. However, the Contractor may, at its discretion, elect to propose lower rates on a task-by-task basis.

Each ODC (Other Direct Costs) entry must be accompanied by a breakdown by element of its composition, and an estimate for each element, together with a total estimated ODC cost. The Contractor will also provide an explanation of why the ODC is required. All travel requirements in the Request for Quotation's PWS must be included. Any additional travel the Contractor considers necessary for performance under the task order must be described, justified, and included in the cost estimate. If required by the task request, the Contractor will use the rates in the then-current Federal Travel Regulation for estimating the cost of travel and per diem.

Quotations shall be submitted in accordance with the instructions provided in each Request for Quotation. All staffing, staffing hours and costs, ODCs by principal category, and totals shall be shown.

The Contractor shall submit a quotation that conforms to the requirements of a Request for Quotation's PWS. In addition to that quotation, the Contractor may submit a separate alternative quotation, if the Contractor feels that another technical approach or pricing structure more economically or efficiently accommodates the Government's requirements. The alternative quotation must be identified as such and include a clear explanation of the differences in approach the perceived benefits to the Government.

Once quotations have been received, the TO/CO need not contact each of the contract holders under the contract before selecting an awardee, if the TO/CO has ensured that each contract holder was provided a fair opportunity to be considered for the order. Award will be made to the successful Contractor based on the evaluation criteria established in the task request.

### G.2.3 Discussions and Final Quotation

When required, discussions will take place at a place and time designated by the TO/CO. After each round of discussions, each offeror will be given the opportunity to revise its quotation, making whatever changes it feels necessary to enhance the possibility of an award. When the TO/CO feels there is a clear

meeting of the minds with all offerors, he/she will conclude discussions and call for a Final Quotation Revision. The final revised quotation shall reflect all agreements reached during discussions.

#### **G.2.4 Award of a Task Order**

A task order specifies work to be accomplished by the Contractor to satisfy a Government requirement, and establishes a time-frame and price, or not-to-exceed price (so identified), for accomplishing the work. The task order defines the performance of a specified unit of work in a definable service or applications area, and may have one or more deliverable products.

The TO/CO will award task orders using a GSA Form 300 (or other appropriate Using Agency form "Award Document") that incorporates the Performance Work Statement and the contract holder's final revised quotation by reference. The Award Document authorizes the Contractor to proceed based upon the agreed-to technical requirements, milestone and deliverable schedules, and total award price. For fixed price tasks, a milestone schedule including start and end dates for each milestone or deliverable shall be submitted with the quotation.

All tasks must be fully staffed within ninety (90) calendar days after task award (the date in block 1 of the GSA Form 300, or Agency equivalent) unless otherwise specified in the task order.

Resumes for key personnel as defined in the Request for Quotation shall be submitted to the Government in the format specified in the task order. The Government will approve or reject the resume in writing within five (5) workdays of its receipt. For approved resumes, the Contractor shall notify the Government when the individual will report for work on the task order. If review of the resume determines the individual not to be qualified for the position indicated, the resume shall be rejected and a written explanation provided. If the Contractor desires further consideration of the candidate, the resume must be resubmitted within two workdays of the notice of rejection with the necessary clarification or additional information. Rejection of a resume does not obviate the Contractor's responsibility to fully staff the facility with ninety (90) calendar days after task award, or as otherwise specified in the task order.

#### **G.2.5 Task Order Changes**

Task orders may be modified, either at the Government's initiative, or in response to a request from the Contractor. No direction changing the requirements of a task order will be binding upon the Contractor unless issued by the TO/CO in writing. Likewise, the Government shall not be liable for an equitable adjustment to the price of a task order on account of a change, unless the change is authorized in writing by the TO/CO. Task order modifications are issued by means of a Standard Form 30 (Amendment of Solicitation/Modification of Contract).

#### **G.2.6 Failure to Reach Agreement**

If agreement cannot be reached on total task order price, time for performance, or other terms of the agreement, the TO/CO may unilaterally establish the terms at issuance. The Contractor may pursue any disagreement as a dispute under the "Disputes" clause of this contract.

#### **G.2.7 Types of Tasks**

##### **G.2.7.1 Fixed-Price Task**

A task order with well-defined requirements and fixed deliverable products will normally be issued on a fixed price basis.

3615 G.2.7.2 Time and Material or Labor Hour Task

3616 A task order for which the performance requirements or deliverable products cannot be quantified or  
3617 well-defined in advance typically will be issued on a time and material or a labor hour basis. Work orders  
3618 are issued by the Government to define individual performance requirements for specific work or  
3619 milestones to be accomplished.

3620  
3621 **G.3 CONTRACT ACCESS FEE**

3622 GSA operating costs associated with awarding and managing this contract may be recovered through a  
3623 Contract Access Fee (CAF) of the total invoice amount.

3624  
3625 GSA will determine the amount of the CAF after contract award. GSA has the unilateral right to change  
3626 the percentage at any time, but not more than once per year. As part of each invoice, the Contractor shall  
3627 collect the CAF and then rebate it to GSA. The timing of the rebate, the organization to which it will be  
3628 delivered, and the method of delivery will all be specified in the individual task orders.

3629  
3630 Where multiple invoices and/or multiple orders are involved, the CAF may be consolidated into one  
3631 payment. To ensure that the payment is credited properly, the Contractor shall submit a check along with  
3632 a printed copy of the "Cost Recovery Report (CRR)" as required by section G.5.4. Each check shall be  
3633 annotated with the corresponding contract number.

3634  
3635 The Contractor shall pay GSA not later than 30 calendar days after the end of the reporting quarters  
3636 specified in section G.5.

3637  
3638 If the full amount of the CAF is not paid within 30 calendar days after the end of the applicable reporting  
3639 period, it shall constitute a debt to the United States Government under the terms of FAR 32.6. The  
3640 Government may exercise all rights under the Debt Collection Act of 1982, including withholding or  
3641 setting off payments and interest on the debt (see FAR 52.232-17, Interest).

3642  
3643 The Contractor shall submit to GSA sales reports and payment information in a timely manner.

3644  
3645 Failure on the part of the Contractor to pay GSA all CAF which is currently due in a timely manner, or  
3646 the willful submission of inaccurate information in sales reports or payment information, constitutes a  
3647 material breach of the contract's terms and conditions.

3648  
3649 **G.4 BILLING AND PAYMENT**

3650 **G.4.1 General Billing Information**

3651 The Contractor shall deliver invoices and billing support data to GSA, and, if so specified in task orders,  
3652 to the Using Agency via paper or electronic format in a mutually agreed upon medium. Agreement will be  
3653 reached at time of award. If agreement cannot be reached, the TO/CO will establish the medium to be  
3654 used. Each invoice shall reflect all charges from the first day through the last day of the previous billing  
3655 cycle. The Contractor shall charge for all services or equipment within three billing cycles after the  
3656 services were rendered.

3657  
3658 The Contractor shall submit a properly prepared invoice for services or supplies that have been accepted  
3659 by the Government not later than five (5) work days after such acceptance has taken place. In the absence  
3660 of Government acceptance within 30 days, the Contractor shall submit the invoice.

3661

A separate invoice shall be submitted for each task order. Invoices shall be prepared on official company letterhead, and provide price information for each contract line item number (CLIN) being billed. In addition, each invoice shall include the following minimum task order identification data:

- GSA contract number
- GSA or Using Agency task order number
- Purchase Request Number: the number used by GSA or the Using Agency to control the commitment of funds
- Period of Performance: monthly services performed or deliverable completed
- Invoice Number
- Client name and address

When the paying office is GSA, the original of each invoice with supporting documentation shall be submitted to the GSA Paying Office designated in Block 24 of the Award Document. In those cases where the paying office is other than GSA, the invoice/paying office will be designated on an order-by-order basis. Up to two additional copies of each invoice with supporting documentation shall be submitted to the address(es) as designated on an order-by-order basis.

For fixed price tasks, an invoice reflecting amounts that do not exceed the fixed price approved for that deliverable product or service in the task order shall be submitted for those tangible deliverable products or services that have been accepted by the Government.

For time and materials tasks, the amount invoiced shall include labor charges for actual hours worked and other allowable and allocable expenses based upon contract rates and conditions, not to exceed the limits specified in the task order, provided that such charges have been accepted by the Government. Contractors should note that profit is to be applied to labor charges only.

For other direct costs (ODC) such as equipment, software, supplies and services not previously priced under this contract, non-routine travel or per diem, etc., invoices shall reflect the Contractor's actual expense for the item, plus General and Administrative costs (G&A) (the only allowable indirect cost). These charges shall not exceed the limits specified in the task order. No charges will be paid by the Government for goods, services, or rates which are not specifically detailed in the individual task order. The invoices shall also include the CAF as ODC. CAF is a percentage of the total amount of goods or services being invoiced. The percentage to be used will be stipulated by GSA prior to issuance of the Requests for Quotation.

Copies of Contractor paid invoices, receipts, and travel vouchers completed in accordance with Federal Travel Regulations (FTR) shall be maintained by the Contractor, for the duration of the task order and for three (3) years thereafter, and made available to the Government upon request.

Invoices for final payment must be so identified, and submitted when tasks have been completed and no further charges are to be incurred. These close-out invoices, or a written notification that final invoicing has been completed, must be submitted to the ordering agency within 60 days of task order completion. A copy of the Government's written acceptance of task completion must be attached to final invoices. If the Contractor requires an extension of the 60-day period, a request with supporting rationale must be received by the TO/CO prior to the end of the 60-day period.

The Contractor shall not be compensated directly for payment of the salaries or wages of the Program Manager, Group Managers, or any other management or staff member not directly associated with and negotiated for task order performance as direct-charge hourly-rate contract line items.

#### **G.4.2 Billing Content**

At least fifteen (15) days prior to its initial submittal, the Contractor shall provide an example and specify the content and format of all invoice(s) to be used for the billing of services required under this contract. Each invoice shall contain all pricing components in sufficient detail necessary to reconcile charges with actual usage.

#### **G.4.3 Payment of Invoices**

Payment of invoices will be made based upon acceptance by the Government of the entire task, of the completion of payable milestones (identified as such) in the task order, of the tangible product deliverable(s) invoiced, or for services rendered during the time period invoiced and accepted on a periodic basis.

If the services provided fail to conform to the technical requirements of the task order or do not conform to the terms and conditions of the contract, the TO/CO will take action in accordance with FAR clause 52.246-04 entitled, "Inspection of Services-Fixed Price", or 52.246-06 entitled, "Inspection of Services Time and Materials and Labor Hour", whichever is applicable.

Payment to the Contractor will not be made for temporary work stoppage due to circumstances beyond the control of the Government, such as acts of God, inclement weather or power outages and the results thereof, or temporary closings of facilities at which Contractor personnel are performing. This may, however, be justification consideration under the clause entitled, "Excusable Delays".

Section B of this contract contains Contract Line Item Numbers (CLINs) for overtime. However, overtime CLINs will only be billable when approved in advance and in writing by the TO/CO to meet task order requirements on a bonafide exigency basis. The Government will not authorize overtime to compensate for shortcomings in Contractor performance.

The Contractor will be reimbursed by the Government for non-routine travel and per diem expenses incurred by Contractor personnel for travel specifically authorized in a task order and approved by the Government. The Government may require the Contractor to use Government supply sources for official travel, subject to the same conditions as those applicable to Government employees; except that the Contractor's employees are not "employees of the Government" as defined by 28 U.S.C. 2671, and thus are not covered under the tort claims provisions of 28 U.S.C. 2679(b). Note: if a time and materials task order is issued under this contract, only actual costs for material are reimbursable, per FAR 16.601.

#### **G.4.4 Billing Disputes**

The Government requires evidence that the services ordered have been provided, and that each associated charge has been priced correctly, or it may dispute the charge.

The Contractor shall attempt to resolve billing disputes to the satisfaction of the Government within sixty (60) calendar days following official notification from the TO/CO or COTR that such a dispute exists. The Contractor shall take a proactive lead in resolving disputes promptly with the initiator of the dispute by establishing and maintaining meaningful dialogue directed toward a fair and equitable resolution. In cases where a resolution is not forthcoming, the Contractor shall submit partial resolutions valued at (less than the total amount in dispute) to the Government for acceptance or denial. The TO/CO or his/her

representative, so designated in writing by the TO/CO, will respond within five business days with a proposed resolution. If either party wants to escalate the dispute to the TO/CO at any time, it may do so. Disputes that are not resolved within 60 calendar days, or within the approved extension time, must be escalated to the TO/CO. Any disputes escalated to the TO/CO will be resolved in accordance with Federal Acquisition Regulation (FAR) 52.233-1 (Alternate I) (Disputes).

#### **G.4.5 Right to Withhold Payment**

The Government reserves the right to withhold a partial or entire payment of an invoice as provided for in FAR clause 52.232-01 entitled, "Payments".

### **G.5 REPORTING REQUIREMENTS**

Contractors are required to provide the requisite reports identified in this section as part of contract administration. Contractors will not be compensated directly by the Government for the preparation and delivery of the requisite reports for the duration of the contract, including the contract base period and all option periods and extended performance periods if applicable.

#### **G.5.1 Sales Reports**

The Contractor shall electronically report all sales under this contract. "Sales" means the dollar amount invoiced under the task order. The Contractor shall accurately report the dollar value, in U. S. dollars and rounded to the nearest whole dollar, by calendar quarter (January 1–March 31, April 1–June 30, July 1–September 30, and October 1–December 31). Reports, including "zero" sales shall be submitted electronically to an e-mail address provided by the ACO after contract award.

The report is due within thirty (30) calendar days following the end of the reporting quarter. The Contractor shall continue to provide the report until final closeout of all task orders. Reporting will be by contract at the task order level. Reports for multiple contracts shall not be consolidated.

Failure to submit required reports or the falsification of reports is sufficient cause for the Government to terminate the contract for default under the termination provisions hereof.

#### **G.5.2 Task Status Reports**

As directed by GSA or client representatives, these reports shall be defined in the Performance Work Statement or work orders, and shall be prepared by task personnel and funded by the client.

#### **G.5.3 Reports on Special Hiring**

The Special Hiring Report is a report that shows whether the Contractor is meeting the 5% minimum special hiring objective required in Section H.8. The report shall be electronically submitted via e-mail to an e-mail address specified by the ACO, using the GSA specified format (currently Microsoft Office Excel 2003), by the tenth work day following the close of the calendar month. The report shall include the Contract Number, Task Order Number, Ordering Agency, Client, Special Hire Organization, Quantity of Total Contact Center Staff, Quantity of Special Hire Staff, and the percentage of Special Hire Staff of Total for each reporting period. The report shall include monthly totals and cumulative totals for all tasks performed under this contract. The report is required even when no tasks were performed during the reporting period, and shall continue to be provided until all task orders are completed under the contract.



**G.5.4 Cost Recovery Report (CRR)**

The CRR is a report of all invoices tendered under this contract, including the collection of all Contract Access Fees. The CRR shall be electronically submitted via e-mail to an e-mail address specified by the ACO, using the GSA specified format (currently Microsoft Office Excel 2003), by the tenth work day following the close of the calendar month. The CRR shall include the Contract Number, Task Order Number, Ordering Agency, Client, the Invoice Number, Date of Invoice, the Invoice Amount, and the amount of the Contract Access Fee for each invoice of the reporting period. The report shall include the total amount of the listed invoices and Contract Access Fees for both the reporting period, as well as cumulative totals for the contract to date. A CRR is required even when no invoices are submitted during the reporting period, and shall continue to be provided until all task orders are completed under the contract.

The Government reserves the right to inspect without further notice such records of the Contractor as pertain to orders under this contract. Willful failure or refusal to furnish the required reports, or falsification thereof, shall constitute sufficient cause for terminating the contract for default under FAR 52.249-8, Default (Fixed-Priced Supply and Service).

**G.5.5 Utilization of Small Business Reporting**

If required according to its business size, the Contractor shall submit the following Standard Forms (SF) and Optional Form (OP) for compliance with FAR, Part 19.7. The Contractor shall provide subcontracting information during the entire time that it is providing task order service under this contract.

The purpose of the forms is to collect subcontracting information on awards to: small business, small-disadvantaged business, women-owned small business, veteran-owned small business, veteran-owned small business, service-disabled veteran-owned small business and HUBZone small business concerns under the Contractor's subcontracting plan.

Each report shall be submitted to the GSA Contracting Officer, with a copy to the TO/CO, if reporting a task order written by an Agency contracting officer. Reports are due 30 days after the close of a reporting period.

Subcontracting Report for Individual Contracts (SF 294): This report is required on every task order and must be submitted semi-annually (for the six months ending March 31st and the twelve months ending September 30<sup>th</sup>). A separate report must be submitted for each task order.

Summary Subcontracting Report (SF 295): The report shall be submitted semi-annually (for the six months ending March 31st and the twelve months ending September 30<sup>th</sup>, if the task order is a Department of Defense requirement, and annually (for the twelve months ending September 30<sup>th</sup> for all other Agencies).

Small Disadvantaged Business Participation Report (OP 312): This report is prepared and submitted only when the Contractor is submitting a report for the last performance period of a task order on a Standard Form 294.

3848 **G.6 MARKETING**

3849 **G.6.1 Marketing Calls**

3850 The Contractor shall coordinate marketing efforts with the Director of USA Service at GSA to keep  
3851 him/her apprised of planned client visits. The current director of GSA's USA Services E-Gov Initiative is  
3852 Mr. Stuart Willoughby. His contact information is as follows:  
3853

3854 General Services Administration  
3855 Office of E-Gov Solutions Support (XCE)  
3856 1800 F Street, NW (Room G-132)  
3857 Washington D.C. 20405-0001

3858 Telephone Number: (202) 501-9121  
3859

3860 **G.6.2 Trade Shows/ Exhibitions**

3861 The Contractor shall report participation in trade shows/exhibitions prior to attendance. Information  
3862 provided shall consist of date, location, and name of conference. The Director of USA Service at GSA  
3863 shall be notified at least two (2) weeks prior to the show/exhibit.  
3864

**SECTION H**

**SPECIAL CONTRACT REQUIREMENTS**

**H.1 TERM OF CONTRACT**

The term of this contract shall cover a Base Period of two (2) years, followed by four (4) two-year option periods. The Government reserves the right to extend the term of this contract at the prices set forth in Section B in accordance with the terms and conditions contained in the clause in Section I, "Option to Extend the Term of the Contract".

During the contract base period and any of the option periods exercised by the ACO, the Government may issue task orders with performance periods, including options, of up to five (5) years in duration, provided that the task orders do not extend beyond year 3 of the Extended Performance Period. The term of such task orders can extend beyond the term of the contract under which it is written. If the situation arises where the task order will extend beyond the maximum term of the contract (i.e., into years eleven [11] through thirteen [13] after contract award) the prices set forth for Extended Performance Periods in Section B shall apply for the respective periods.

**H.1.1 Transition and Start-Up**

The time period required to transition new requirements will be determined on a case-by-case basis, and shall be stated in individual task orders. Transition shall begin at Notice-To-Proceed and continue for a period as specified in the task order. During the transition period, the Contractor shall work with the Government to develop a sound project implementation plan and to perform all preparatory work to establish one or more fully functional multi-channel contact centers in support of the task. The Government will transfer business and procedural data, including appropriate training material, to the Contractor, and work with the Contractor to establish appropriate system feeds. The transition period will provide the Contractor with the opportunity to prepare and staff its contact center; develop the support the knowledge base and scripts for automated response in support of the project; establish a fully functional contact center to handle the expected work volume; and complete all transition related activities to migrate the service to the new center. Government personnel will closely monitor the Contractor's effort to ensure a successful launch. Based on the Contractor's ability and expert advice on transitioning the work volume, the Government reserves the right to coordinate with the Contractor to achieve a staffing plan that minimizes disruption of the existing services and seamlessly transitions the customer base and work volumes to the new center.

**H.1.2 North American Industry Classifications System (NAICS) 519190**

Effective October 1, 2000, Small Business size standards for all Federal Government Programs are those that the U.S. Small Business Administration (SBA), in conjunction with the U.S. Census Bureau, has established for industries as described in the NAICS. Size standard for industries described in Standard Industrial Classification (SIC) have been replaced by the NAICS and no longer apply.

For the purpose of this contract, NAICS Code 519190, Other Information Services, applies. The size standard is \$6,500,000.

3910

3911 **H.2 OVERALL CONTRACT MINIMUM AMOUNT**

3912 The Government guarantees that this Contractor will be awarded a minimum order amount of \$10,000.00  
3913 (ten thousand dollars) in aggregate task orders.

3914

3915 Task orders involving any item listed under Section B of this contract, including any Other Direct Costs  
3916 associated with that item, will apply toward the calculation of the minimum order amount.

3917

3918 **H.3 OVERALL CONTRACT MAXIMUM AMOUNT**

3919 The maximum aggregate value of all task orders awarded under "USA Contact" shall not exceed  
3920 \$2,500,000,000.00. USA Contact is defined as all contracts resulting from GSA solicitation  
3921 GSV07PD0007.

3922

3923 Task orders involving any items listed under Section B of this contract, including any Other Direct Costs  
3924 associated with those items, will apply toward the calculation of the minimum order amount. The  
3925 maximum contract limitation shall be applied to the aggregate value of the base period and all option  
3926 periods of all USA Contact contracts.

3927

3928 **H.4 SUPERVISION OF CONTRACTOR PERSONNEL**

3929 The Contractor's employees shall remain under the Contractor's direct supervision at all times. Although  
3930 the Government will coordinate direction within the scope of the contract, detailed instructions for the  
3931 Contractor's employees' performance and supervision shall remain the sole responsibility of the  
3932 Contractor.

3933

3934 **H.5 STANDARDS OF CONDUCT AND RESTRICTIONS**

3935 The Contractor shall adhere to the same professional and ethical standards of conduct required of  
3936 Government personnel. The Contractor shall not:

3937

3938     o Discuss with unauthorized persons any information obtained in the performance of work under  
3939     this contract;

3940

3941     o Conduct business other than that which is covered by this contract during periods paid by the  
3942     Government;

3943

3944     o Conduct business not directly related to this contract on Government premises;

3945

3946     o Use computer systems and/or other Government facilities for company or personal business; or

3947

3948     o Recruit personnel on Government premises or otherwise act to disrupt official Government  
3949     business.

3950

3951 **H.6 REMOVAL OF CONTRACTOR PERSONNEL**

3952 Transfer and/or assignment of Contractor personnel shall be the prerogative of the Contractor;  
3953 however, when the Task Order Contracting Officer (TO/CO) so directs, the Contractor shall  
3954 remove from performance on the contract any and all persons who identified by the TO/CO as  
3955 endangering life, property, or national security. The TO/CO's decision is final and is not subject  
3956 to discussion or negotiation.

**H.7 KEY PERSONNEL**

The Program Manager, Project Manager, or a designee who is capable of binding the Contractor contractually shall be considered key personnel for this contract. The Program Manager shall be the overall manager of the contract and single point-of-contact for resolution of contract-related issues.

The Contractor shall provide the following key personnel with assignment responsibilities as indicated:

**H.7.1 Program Manager** – responsible for managing and implementing the overall contract requirement and overseeing implementation of more complex tasks; organizes, directs, and coordinates planning, and implements all contract and/or task order support activities; interacts with high level program officials regarding issues and status of the contract and/or task orders; coordinates financial and staffing resources; monitors and analyzes contract and performance data, and reports results to senior Government officials; coordinates recruitment and training activities to keep staff current on agency programs and performance objectives; manages the activities of subcontractors; and reviews contract, operations and management reports. The Government reserves the right to approve the selection of the Contractor-assigned Program Manager prior to his/her placement in supporting a task order issued under this contract.

**H.7.2 Project Manager** – responsible for managing and implementing the overall Project; organizes, directs, and coordinates planning, and implements all Project support activities; interacts with Government program officials regarding issues and status of Projects; coordinates financial and staffing resources; monitors and analyzes performance data and reports results to the Government; coordinates training activities to keep staff current on Government programs and customer service objectives; and manages the activities of subcontractors. The Government reserves the right to approve the selection of the Contractor-assigned Project Manager prior to his/her placement in support of the task.

**H.7.3 Site Manager** – responsible for overall daily operations and management of the contact center, including staffing, facility, training, service delivery, problem escalation and resolution, and performance monitoring; provides technical assistance for the planning, design, installation, modification, and operation of telecommunications and information systems capabilities; ensures all functions and processes are implemented and operated properly.

**H.7.4 Information Systems Security Manager (ISSM)** – responsible for ensuring that information systems used in supporting task requirements comply with initial and ongoing information systems security requirements, in accordance with FIPS Publication 200, Minimum Security Requirements of Federal Information Systems. The ISSM shall ensure that information systems used to support a specific task meet the minimum security requirements as defined in FIPS Publication 200 through the use of security controls, in accordance with the NIST Special Publication 800 – 53, Recommended Security Controls for Federal Information Systems, As Amended. This includes preparing all required documentation for the compliance process, including a security plan, risk assessments, contingency and contingency test plans, a configuration management plan, system test and evaluation reports, security certifications, and an accreditation package.

The Contractor shall use all commercially reasonable efforts to ensure the continued availability of key personnel assigned to each task. Key personnel proposed and accepted for task orders issued under this contract are expected to be and remain dedicated to the task. Unless indicated otherwise in the Request for Quotation, key personnel will be dedicated to the task on a full-time basis. Substitutions will not be accepted unless specifically agreed upon in writing by the TO/CO. During the first one hundred eighty (180) days of the task order performance period, no key personnel substitutions will be permitted unless such substitutions are necessitated by an individual's sudden illness, death, or termination of employment,

or as otherwise approved by the TO/CO. In any of these events, the Contractor shall promptly notify the TO/CO's Technical Representative (COTR) and provide the information required by Section G of this contract. After the initial one hundred eighty (180) day period, all proposed substitutions of key personnel must be submitted in writing, at least thirty (30) business days in advance of the proposed substitution, to the TO/CO except as provided herein. This provision also applies to personnel engaged by the Contractor's teaming partners and/or subcontractors if they are designated as key personnel.

#### **H.8 SPECIAL HIRING REQUIREMENT**

The Government is committed to using the services provided by individuals who are blind or severely handicapped through organizations affiliated with the Committee for Purchase From People Who Are Blind or Severely Disabled (National Industries for the Blind [NIB] and National Industries for the Severely Handicapped [NISH]) to fulfill part of the staffing requirements for this contract. Contractor-provided personnel shall consist of a minimum of five (5) percent of individuals employed through organizations affiliated with NIB and/or NISH. The Contractor is responsible for working with NIB and/or NISH affiliated agencies to recruit, hire, and train these individuals to ensure that performance objectives are not compromised. The Contractor is responsible for compensating NIB/NISH affiliated organizations for any work performed to recruit, hire, train, and retain these individuals for the performance of each task.

#### **H.9 INFORMATION SPECIALISTS HOURLY RATE**

The unit of measure for the Hourly Information Specialist (IS) Rate is "HOUR" and refers to a "worked" hour. "Worked" time is defined as all time expended by an IS:

- gathering, researching, composing, or delivering responses to customer inquiries;
- listening to, or actively communicating with, customers;
- in performance of post inquiry work (such as updating systems or conducting follow up activities);
- in the available (to respond to a call or inquiry) mode \*;
- while receiving instruction or coaching \*;
- while on breaks \*; and
- while attending task-related meetings \*.

Activities denoted with \* are not accounted for nor reimbursed as "work time" under Information Specialist Hourly Rate for Shared or Non-Dedicated Response Services.

#### **H.10 PLACE OF PERFORMANCE**

The work to be performed by the Contractor can be categorized as follows:

- Start-up and implementation;
- Contact center operations and management; and
- Project management

Work performed during start-up can take place at the Contractor's facilities or on Government premises. Work performed for contact center operations and management shall take place primarily at one or more

locations designated by the Contractor. Work performed for Project Management shall take place primarily at the Contractor's premises.

#### **H.11 FEDERAL HOLIDAYS**

The following days are considered Federal holidays and will be observed by the Contractor(s) in performance of work under each task order:

- New Year's Day (January 1)
- Martin Luther King, Jr., Day (3<sup>rd</sup> Monday in January)
- Washington's Birthday (3<sup>rd</sup> Monday in February)
- Memorial Day (Last Monday in May)
- Independence Day (July 4<sup>th</sup>)
- Labor Day (1<sup>st</sup> Monday in September)
- Columbus Day (2<sup>nd</sup> Monday in October)
- Veterans Day (November 11)
- Thanksgiving Day (4<sup>th</sup> Thursday in November)
- Christmas Day (December 25<sup>th</sup>)

If any of the above holidays falls on a Saturday, then the preceding Friday is the holiday. If any of the above holidays falls on a Sunday, then the following Monday is the holiday.

In addition to the days designated above as holidays, the Government observes the following as non-working days:

- Any other day designated by Federal Statute
- Any day designated by Executive Order
- Any other day designated by the President's Proclamation

Contractor personnel shall work in accordance with the Government's designated holiday schedule unless otherwise stated specifically in the task order.

**NOTE:** Additional non-working days are sometimes authorized, but these are regional in nature (e.g., Inauguration Day in Washington, DC) and not included as Federal holidays for the purposes of this contract.

#### **H.12 SYSTEMS REQUIREMENTS**

The Contractor shall provide and maintain robust and scalable state-of-the-art multi-channel contact center system hardware, software, and accessories to meet task order requirements. The Contractor shall provide a commercial off-the-shelf (COTS) solution that meets the Government requirements. The system shall be adequately sized and equipped to handle fluctuations in the volume of inquiries received. The system shall be configured such that it can easily be expanded to accommodate growth in call volume; electronic and written inquiries, electronic transactions, automated voice responses and FAQ services; knowledge base; inquiry tracking; data storage and retrieval; automatic fax-back; and other

4093 affected areas. The systems shall have adequate backup capability to maximize availability and reliability  
4094 of all services.  
4095

4096 When Earned Value Management (EVM) is determined to be applicable to individual task orders issued  
4097 under this contract, the requirements of Federal Acquisition Regulation: 52.234-02 Notice of Earned  
4098 Value Management System Pre-Award; 52.234-03 Notice of Earned Value Management System; and  
4099 52.234-04 Earned Value Management System will apply.

#### 4100 4101 **H.13 PERMITS**

4102 The Contractor shall, without additional expense to the Government, be responsible for obtaining all  
4103 necessary licenses and permits in connection with the performance of this contract. The Contractor shall  
4104 also be responsible for complying with any applicable Federal, state, and municipal laws, codes, or  
4105 regulations.  
4106

#### 4107 **H.14 TELECOMMUNICATIONS INTERFACE**

4108 The Government may provide its own telecommunication services to connect to the Contractor's  
4109 facilities. The type of telecommunications access provided shall be at the discretion of the Government.  
4110 After task order award, the Government will determine what solution is the most efficient and cost  
4111 effective and will decide at that time what type of telecommunications access to use. If the Government  
4112 requires an interface other than the one detailed by the Contractor in its Technical Proposal, the TO/CO  
4113 and the Contractor may negotiate an equitable adjustment to the task order amount.  
4114

#### 4115 **H.15 TRAVEL**

##### 4116 **H.15.1 Routine Travel**

4117 Neither Contractor nor subcontractor employees will not be reimbursed for commuter travel for  
4118 employees between their residences and their regular assigned duty stations, or for travel in support of  
4119 project start-up and the day-to-day performance of this contract. A regular assigned duty station is  
4120 defined as the Contractor employee's continuing place of duty, whether the assignment is permanent or  
4121 temporary.  
4122

##### 4123 **H.15.2 Non-Routine Travel**

4124 Non-routine travel directed by the Government will require the advance written approval of the TO/CO or  
4125 his/her designee, and will be reimbursed as ODC expense. Reimbursement shall not exceed the rates and  
4126 expenses allowed by Federal Travel Regulations (see <http://www.gsa.gov> "Federal Travel Regulation") to  
4127 a Government employee traveling under identical circumstances. The Contractor shall comply with the  
4128 more restrictive of its own internal policies or with the Government's policies for making reimbursable  
4129 travel and per-diem expenditures. The Government will supply the Contractor with a copy of its travel  
4130 policies upon award of each task order issued under this contract or they may be accessed online as noted  
4131 above. Note: if the task order is issued on a time and materials, or labor-hour basis, the provisions of  
4132 Federal Acquisition Regulation 16.601 apply.  
4133

#### 4134 **H.16 CONTINGENCIES**

4135 The Contractor shall ensure continuity of call center operations, and shall be entirely responsible for  
4136 maintaining continuity of support for the assigned tasks. Contractor employment and staffing difficulties  
4137 will not be acceptable justification for failure to meet the requirements of the Performance Work  
4138 Statement, Section C of this contract.  
4139



If required by the task order request for proposal, Contractor shall submit a contingency plan to the TO/CO's Technical Representative (COTR) for approval by the task order start date. The plan shall outline the Contractor's response to operational problems and its anticipated response to unusual events that may occur during the life of the task order and disrupt operations (such as a structural fire, accident, terrorist attack, personnel strike, extended power failure, etc.) which may require the Contractor to proceed under altered work conditions at locations other than those originally established. The Contractor shall continue to provide the services required by the contract, as directed by the COTR, for the duration of such an emergency situation.

#### **H.17 COMPLIANCE WITH SECTION 508**

The services requested under this contract are to be accessed by callers/users employing various technologies, including, but not limited to: touch-tone and rotary/dial-pulse telephones, TDD/TTY devices, mobile and wireless telephones, wireless communications devices, facsimile equipment, portable and desktop computers, and Internet appliances. Callers/users may use these devices to access the requested services via the telephone network, mobile and wireless network, the Internet, or other communications media. The Government requires that the information and services provided by the Contractor under this contract be made available in accessible formats.

The Contractor shall ensure that the technology infrastructure and support services provided are fully accessible by individuals with disabilities as required by Section 508 of the Rehabilitation Act Amendments of 1998. All Electronic and Information Technology systems provided under this contract must meet the applicable accessibility standards established in 36 CFR 1194, unless an agency exception to this requirement exists. 36CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as amended, and is viewable at <http://www.section508.gov> – E & IT Requirements.

#### **H.18 CONSTRUCTIVE CHANGE ORDERS**

No order, statement, or conduct of the TO/CO, authorized representative(s) of the TO/CO, or any other representative of the Government, whether or not the individual is acting within the limits of his/her authority shall constitute a change under the "Changes" clause of this contract, or entitle the Contractor to an equitable adjustment of the task order price or delivery schedule unless such change is issued in writing and signed by the TO/CO. No representative of the TO/CO shall be authorized to issue a written change order under the "Changes" clause of this contract. The Contractor shall be under no obligation to comply with any orders or directions not issued in writing and signed by the TO/CO.

#### **H.19 GOVERNMENT OBSERVATIONS**

Prior to the award of a task order, the TO/CO and the task order's COTR will develop a Quality Assurance Evaluation (QAE) plan designed to evaluate the quality of service being provided to Government. The QAE plan will be used in conjunction with the performance standards set forth in the task order's statement of objectives. The QAE process will include such things as: sampling of services; a method of inspecting the sample; the frequency of such inspections; documentation of the QAE findings; feedback from customers; the minutes of meetings with the Contractor (periodic and ad hoc); Contractor response to evaluation findings and the corrective action(s) instituted, if any. The process will form the basis for determining the acceptability of services provided under the Inspection of Services clause of the contract.

In addition, Government safety officials and other agency officials reserve the right to conduct surveys and inspections of operations and facilities. Other Government personnel, such as Inspector General's staff, are authorized to observe Contractor performance and records. In addition, the Government may use third-party Contractor personnel to provide various forms of service, such as audits or customer

surveys. Any such Contractor personnel will be required to sign non-disclosure agreements to protect each contract holder's procurement-sensitive information. These personnel will not interfere with the Contractor's performance, and the Contractor shall provide all such personnel with its full cooperation. All comments concerning the Contractor's operations will be provided to the COTR. Findings from any audit, report, survey, etc. may be provided to the TO/CO, as deemed appropriate by the COTR.

## **H.20 ADMINISTRATIVE IMPROVEMENTS/SERVICE ENHANCEMENTS**

It is the intention of the Government to work with the Contractor to introduce administrative improvements and service enhancements that would be advantageous to the Government and the Contractor. The Contractor agrees to negotiate in good faith with the Government to implement any suggested administrative improvements or service enhancements that are determined to be in the best interests of both parties.

## **H.21 TASK ORDER PHASE-OUT PROCEDURES**

At the conclusion of a task order, the Government may require the Contractor to participate in a task order phase-out process. If the Government so directs, the following procedures will apply:

After the Government's selection of a successor Contractor, but prior to the end of the expiring task order, the current Contractor and the successor Contractor will jointly prepare a mutually agreeable detailed plan for the transition to the successor Contractor.

The current Contractor agrees to provide, if required in writing by the Government, transitional services for a period of up to ninety (90) days after the expiration of the current task order at the then current task order prices. Continuity for all operations required under the task order shall be maintained during that period.

## **H.22 DISCLOSURE OF INFORMATION**

Any Government information made available to the Contractor or gathered by the Contractor from Government employees or customers shall be used only for the purpose of carrying out the provisions of this contract, and shall not be divulged or made known in any manner to any person except as may be necessary in the performance of task requirements. Furthermore, no article, book, pamphlet, recording, broadcast, speech, television appearance, film, or photograph concerning any aspect of work performed under this contract shall be published or disseminated through any medium without prior written authorization from the Government. These obligations do not cease upon expiration or termination of this contract. The Contractor shall include the substance of this provision in all contracts for employment and subcontracting work performed under this contract.

In performance of this contract, the Contractor agrees to assume responsibility for protecting the confidentiality of Government information, and for ensuring that all work is performed under the supervision of the Contractor or the Contractor's responsible employees. The Contractor shall keep confidential information provided by inquirers consistent with Federal law, primarily the Privacy Act of 1974 and the Freedom of Information Act and their amendments. The Contractor shall not disclose personal identification information (e.g. name, address, telephone number) or personal financial information (e.g. credit card account number) of an inquirer without the verbal or written consent of the inquirer, provided that such verbal consent is recorded.

Inquirers who make threats against persons or property, either Government or private, may have already forfeited their rights to privacy thereby. The Contractor shall work with the appropriate Government law enforcement agency(ies) for the prevention of threatened crime on a case-by-case basis.

Each employee of the Contractor to whom information may be made available or disclosed shall be notified in writing by the Contractor that information disclosed to such employee can be used only for the purpose and to the extent authorized herein. Use of such information for a purpose or to an extent not authorized herein may subject the offender to criminal sanctions imposed by 18 United States Code (U.S.C.) 641. The law provides, in pertinent part, that whoever knowingly converts to their use or to the use of another, or without authority sells, conveys, or disposes of any record of the United States, or whoever receives the same with intent to convert it to his/her use or gain, knowing it to have been converted, shall be guilty of a crime punishable by a fine of up to \$10,000, or imprisonment up to 10 years, or both.

The limitations noted in the preceding paragraphs do not apply to information which has been made public by the Government. Further, this provision does not preclude the use of any information independently acquired by the Contractor without such limitations, or prohibit an agreement, at no cost to the Government, between the Contractor and the information owner, which provides for greater rights to the Contractor.

## **H.23 LIABILITY**

### **H.23.1 Performance Liability**

The Contractor will not be liable for any form of consideration when the failure to provide service or meet contract requirements arises from causes beyond the control and without the fault or negligence of the Contractor. Examples of such causes include:

- Acts of God or of the public enemy
- Fires
- Floods
- Epidemics
- Quarantine restrictions
- Freight embargoes
- Unusually severe weather
- Denial of access by a third party

### **H.23.2 Information Liability**

The Contractor shall be solely responsible for damages suffered by the public that result from the use and/or dissemination of information not previously approved by the Government during the performance of this contract. Information to be supplied by the Government, along with the approval process required for adding new and/or updating existing information, will be specified in individual task orders.

## **H.24 HOLD HARMLESS AND INDENNIFICATION**

The Contractor shall save, hold harmless, and indemnify the Government against any and all liability, claims, and costs of whatever kind or nature for injury to or death of any person or persons, and for loss, destruction, or damage to any property (including electronic storage areas), occurring in connection with or in any way incident to or arising out of the occupancy, use, service, operations, or performance of work under the terms of this contract, resulting in whole or in part from the willful, negligent, or careless acts or

omissions of the Contractor, its subcontractors, or any employee, agent, or representative of the Contractor or its subcontractors.

## **H.25 OWNERSHIP OF DATA**

During the course of this contract, the Contractor will create and maintain databases that are used in support of processing inquiries, and contain information such as scripted responses, topical information entries, business rules, preformatted responses, personal information, transaction histories, and agency contacts. The Contractor may also capture and store certain inquiry data in Contractor-provided and/or Government-provided databases. All of this information is the property of the Government. At the conclusion of each task order issued under this contract, or upon termination of this contract, all information resources developed in support of the task(s), including any databases or associated formats or call tools, shall be turned over to the Government in their entirety. Should a task order terminate for any reason, the Contractor shall arrange for the timely transfer of such data records to the Government. The Contractor may not keep any information resources or paper or electronic copies of information without the express written consent of the Contracting Officer's Technical Representative. If the supporting software systems are not commercially available at that time, the Contractor shall sell or license the software to the agency at a good faith mutually agreed upon price. Failure on the part of the Contractor to negotiate such pricing in good faith, or to provide such software on demand shall be subject to the Disputes clause of this contract.

## **H.26 NEWS RELEASES**

News releases pertaining to task orders issued under this contract shall not be made by the Contractor without the prior written approval of the ACO or his/her designee. A minimum of 48 hours' notice is required to respond to Contractor requests for approval to release contract-related information to the news media. The Contractor's request shall contain a copy of the specific information for which the Contractor is seeking approval to release, and a description of the intended form of release.

## **H.27 ELECTRONIC ACCESS TO THE CONTRACT**

The Contractor is hereby advised that, in compliance with the Freedom of Information Act, a redacted version of the contract and all modifications thereto will be made available on the Internet.

The Contractor shall submit both a redacted version and a non-redacted version of the contract to the ACO within fifteen (15) business days after contract award. Each version shall be submitted in both "Adobe .pdf" format and in "Microsoft Word" format. The redacted version shall be prepared in accordance with Freedom of Information Act guidance and will be approved by the ACO before release.

This process shall be repeated each time a modification to the contract is awarded.

## **H.28 MARKETING EFFORTS**

The Contractor is responsible for ongoing marketing efforts during the life of this contract as specified below. Such efforts will commence not later than thirty (30) calendar days after contract award, subject to the following:

- All marketing brochures shall conform to the requirements of the GSAR 552.203-70 and be approved by the ACO prior to issuance
- Contractors shall not assist prospective client agencies in the development of future requirements, or provide preliminary estimates, except as provided for in an existing task order

- 4332
- 4333     o Contractors shall not include marketing expenses as a direct cost item
- 4334
- 4335     o Approval for marketing by the Contractor does not obligate GSA to undertake, under this
- 4336         contract, any potential work identified
- 4337

4338     **H.28.1 Marketing Calls**

4339     The Contractor shall prepare and give formal or informal presentations to prospective GSA clients on the  
4340     contract when requested by the Government. These presentations will be consistent with materials  
4341     previously reviewed and approved for use by GSA.

4342

4343     **H.28.2 Marketing Materials**

4344     The Contractor shall provide marketing materials which will enhance program and service visibility. The  
4345     types of marketing materials provided shall be at the discretion of the Contractor, and may include the  
4346     following: brochures, pamphlets, visual aids, newsletters, technology updates, white papers, news  
4347     releases, training tools and seminars, work tools and materials such as quick reference  
4348     estimating/measuring tools, folders, pens, mouse pads, rolodex cards, and literature. The Contractor shall  
4349     provide sample marketing materials prior to distribution. GSA will have ten (10) working days to review  
4350     and approve materials.



**PART II****SECTION I - CONTRACT CLAUSES****I.1 52.252-2 Clauses Incorporated by Reference (FEB 1998)**

This contract incorporates the following clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make a copy of the full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): <http://www.arnet.gov/far>. \* indicates a clauses added to the contract after the release of the solicitation.

**I.1.1 FEDERAL ACQUISITION REGULATION (48 CFR, APR 1984) CLAUSES**

<b><u>Clause No.</u></b>	<b><u>Clause Title</u></b>	<b><u>Date</u></b>
52.202-01	Definitions	DEC 2001
52.203-03	Gratuities	APR 1984
52.203-05	Covenant Against Contingent Fees	APR 1984
52.203-06	Restrictions on Subcontractor Sales to the Government	SEP 2006
52.203-07	Anti-Kickback Procedures	JUL 1995
52.203-08	Cancellations, Restrictions and Recovery of Funds for Illegal or Improper Activity	JAN 1997
52.203-10	Price or Fee Adjustment for Illegal or Improper Activity	JAN 1997
52.203-12	Limitation on Payments to Influence Certain Federal Transactions	SEP 2005
52.203-13	Contractor Code of Business Ethics and Conduct	DEC 2007
52.203-14	Display of Hotline Poster(s)	DEC 2007
52.204-04	Printed or Copied Double-Sided on Recycled Paper	AUG 2000
52.204-07*	Central Contractor Registration	JUL 2006
52.204-09*	Personal Identity Verification of Contractor Personnel	SEP 2007
52.209-06	Protecting the Government's Interest When Subcontracting with Contractors Debarred, Suspended or Proposed for Debarment	SEP 2006
52.215-02	Audit and Records—Negotiation	JUN 1999
52.215-08	Order of Precedence—Uniform Contract Format	OCT 1997
52.215-11*	Price Reduction for Defective Cost or Pricing Data—Modifications	OCT 1997

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52.215-13*	Subcontractor Cost or Pricing Data—Modifications	OCT 1997
52.215-17	Waiver of Facilities Capital Cost of Money	OCT 1997
52-215-21	Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data—Modifications	OCT 1997
52.216-07*	Allowable Cost and Payment	DEC 2002
52-216-18	Ordering	OCT 1995
52.216-19	Order Limitations	OCT 1995
52-216-22	Indefinite Quantity	OCT 1995
52.217-08	Option to Extend Services	NOV 1999
52.217-09	Option to Extend the Term of the Contract	MAR 2000
52.219-08	Utilization of Small Business Concerns	MAY 2004
52-219-09	Small Business Subcontracting Plan (Alternate II (JAN 2002))	SEP 2006
52.219-16	Liquidated Damages—Subcontracting Plan	JAN 1999
52.222-01	Notice to the Government of Labor Disputes	FEB 1997
52.222-03	Convict Labor	JUN 2003
52.222-04	Contract Work Hours and Safety Standards Act—Overtime Compensation	JUL 2005
52.222-21	Prohibition of Segregated Facilities	FEB 1999
52.222-26	Equal Opportunity	APR 2002
52.222-29	Notification of Visa Denial	JUN 2003
52.222-35	Equal Opportunity for Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans	SEP 2006
52.222-36	Affirmation action for Workers with Disabilities	JUN 1998
52.222-37	Employment Reports on Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans	SEP 2006
52.222-41	Service Contract Act of 1965, As Amended	JUL 2005
52.222-43	Fair Labor Standards Act and Service Contract Act—Price Adjustment (Multiple Year and Option Contracts)	NOV 2006
52.222-49	Service Contract Act—Place of Performance Unknown	MAY 1989
52.222-50	Combating Trafficking in Persons	AUG 2007



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52.223-06	Drug-Free Workplace	MAY 2001
52.223-13	Certification of Toxic Chemical Release Reporting	AUG 2003
52.223-14	Toxic Chemical Release Reporting	AUG 2003
52.224-01	Privacy Act Notification	APR 1984
52.224-02	Privacy Act	APR 1984
52.225-13	Restrictions on Certain Foreign Purchases	FEB 2006
52.227-01	Authorization and Consent	JUL 1995
52.227-14	Rights in Data—General (Alternate II (JUN 1987))	JUN 1987
52.227-17	Rights in Data—Special Works	DEC 2007
52.227-23	Rights to Proposal Data (Technical)	JUN 1987
52.232-01	Payments	APR 1984
52.232-07	Payments – Time-And-Materials and Labor-Hours Contracts	FEB 2007
52.232-08	Discounts for Prompt Payments	FEB 2002
52.232-09	Limitation on Withholding of Payments	APR 1984
52.232-11	Extras	APR 1984
52.232-17	Interest	JUN 1996
52.232-18	Availability of Funds	APR 1984
52.232-23	Assignment of Claims	JAN 1986
52.232-33	Payment by Electric Funds Transfer—Central Contractor Registration	OCT 2003
52.232-37	Multiple Payment Arrangements	MAY 1999
52.233-01	Disputes (Alternate I (DEC 1991))	JUL 2002
52.233-03	Protest after Award	AUG 1996
52.233-04	Applicable Law for Breach of Contract Claim	OCT 2004
52.237-03	Continuity of Services	JAN 1991
52.239-01	Privacy or Security Safeguards	AUG 1996
52.242-01	Notice of Intent to Disallow Costs	APR 1984

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52.242-13	Bankruptcy	JUL 1995
52.242-15	Stop-Work Order	AUG 1989
52.242-17	Government Delay of Work	APR 1984
52.243-01	Changes—Fixed Price (Alternate II (AUG 1987))	AUG 1987
52.243-03	Changes – Time-and-Materials or Labor-Hour	SEP 2000
52.243-7	Notification of Changes	APR 1984
52.244-02	Subcontracts	JUN 2007
52.244-05	Competition in Subcontracting	DEC 1996
52.244-06	Subcontracts for Commercial Items	SEP 2006
52.245-01*	Use and Charges	JUN 2007
52.246-04*	Inspection of Services—Fixed Price	AUG 1996
52.246-06*	Inspection—Time-and-Material and Labor-Hour	JUN 2003
52.246-25	Limitation of Liability—Services	FEB 1997
52.248-01	Value Engineering	FEB 2000
52.249-01	Termination for Convenience of the Government (Fixed-Price) (Short Form)	APR 1984
52.249-6*	Termination (Cost Reimbursement, with Alternate IV)	MAY 2004
52.249-08	Default (Fixed-Price Supply and Service)	APR 1984
52.249-14*	Excusable Delays	APR 1984
52.252-06	Authorized Deviations in Clauses	APR 1984
52.253-01	Computer Generated Forms	JAN 1991

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4370

**4371 I.1.2 GENERAL SERVICES ADMINISTRATION MANUAL (GSAM) CLAUSES**

4372

**4373 52.222-42 STATEMENT OF EQUIVALENT RATES FOR FEDERAL HIRES (MAY 1989)**

4374 In compliance with the Service Contract Act of 1965, as amended, and the regulations of the Secretary of  
4375 Labor (29 CFR Part 4), this clause identifies the classes of service employees expected to be employed  
4376 under the contract and states the wages and fringe benefits payable to each if they were employed by the  
4377 contracting agency subject to the provisions of 5 U.S.C. 5341 or 5332.

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4380

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*This Statement is for Information Only: It is not a Wage Determination*

Employee Class	Monetary Wage-Fringe Benefits
Library Technician	Wage Rate: \$13.72 / hr. Health and Welfare: \$3.16 / hr.
Order Clerk I	Wage Rate: \$9.71 / hr. Health and Welfare: \$3.16 / hr.
Computer Operator III	Wage Rate: \$20.69 / hr. Health and Welfare: \$3.16 / hr.
Computer Programmer II	Wage Rate: \$26.11 / hr. Health and Welfare: \$3.16 / hr.
Computer Systems Analyst I	Wage Rate: \$27.62 / hr. Health and Welfare: \$3.16 / hr.
Technical Writer II	Wage Rate: \$15.23 / hr. Health and Welfare: \$3.16 / hr.

4382

4383

4384 **552.203-71 RESTRICTION ON ADVERTISING (SEP 1999)**

4385 The Contractor shall not refer to this contract in commercial advertising or similar promotions in such a  
 4386 manner as to state or imply that the product or service provided is endorsed or preferred by the White  
 4387 House, the Executive Office of the President, or any other element of the Federal Government, or is  
 4388 considered by these entities to be superior to other products or services. Any advertisement by the  
 4389 Contractor, including price-off coupons, that refers to a military resale activity shall contain the following  
 4390 statement:

391

4392

4393

"This advertisement is neither paid for nor sponsored, in whole or in part, by any element  
 of the United States Government."

4394 **552.215-70 EXAMINATION OF RECORDS BY GSA (FEB 1996)**

4395 The Contractor agrees that the Administrator of General Services or any duly authorized representatives  
 4396 shall, until the expiration of 3 years after final payment under this contract, or of the time periods for the  
 4397 particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever  
 4398 expires earlier, have access to and the right to examine any books, documents, papers, and records of the  
 4399 Contractor involving transactions related to this contract or compliance with any clauses thereunder. The  
 4400 Contractor further agrees to include in all its subcontracts hereunder a provision to the effect that the  
 4401 subcontractor agrees that the Administrator of General Services or any authorized representatives shall,  
 4402 until the expiration of 3 years after final payment under the subcontract, or of the time periods for the  
 4403 particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever  
 4404 expires earlier, have access to and the right to examine any books, documents, papers, and records of such  
 4405 subcontractor involving transactions related to the subcontract or compliance with any clauses there  
 4406 under. The term "subcontract" as used in this clause excludes (a) purchase orders not exceeding \$100,000  
 4407 and (b) subcontracts or purchase orders for public utility services at rates established for uniform  
 4408 applicability to the general public.

4409

4410 **552.232-1 PAYMENTS (APR 1984) (DEVIATION, FAR 52.232-1)**

- 4411 (a) The Government shall pay the Contractor, without submission of invoices or vouchers, 30 days after  
4412 the service period, the prices stipulated in this contract for supplies delivered and accepted or  
4413 services rendered and accepted, less any deductions provided in this contract.
- 4414 (b) Unless otherwise specified in this contract, the Government will make payment on partial deliveries  
4415 accepted by the Government if either:
- 4416 (1) The amount due on the deliveries warrants it.
- 4417 (2) The Contractor requests it and the amount due on the deliveries is at least \$1,000 or 50 percent of  
4418 the total contract price.
- 4419 (c) When processing payment, GSA's Finance Office will automatically generate the 12 digit invoice  
4420 number using the ACT number assigned to the contract, followed by an abbreviated month and year  
4421 of service (e.g., 84261554JUN7, for June 1997). The ACT number appears on the contract award  
4422 document.

4423 **552.232-25 PROMPT PAYMENT (JUL 1998) (DEVIATION FAR 52.232-25)**

4424 Notwithstanding any other payment clause in this contract, the Government will make invoice payments  
4425 and contract financing payments under the terms and conditions specified in this clause. Payment shall be  
4426 considered as being made on the day a check is dated or the date of an electronic funds transfer.  
4427 Definitions of pertinent terms are set forth in section 32.902 of the Federal Acquisition Regulation. All  
4428 days referred to in this clause are calendar days, unless otherwise specified. (However, see subparagraph  
4429 (a)(4) of this clause concerning payments due on Saturdays, Sundays, and legal holidays.)

4430

4431 (a) Invoice payments.

4432 (1) The due date for making invoice payments by the designated payment office is:

4433 (i) For orders placed electronically by the General Services Administration (GSA) Federal  
4434 Supply Service (FSS), and to be paid by GSA through electronic funds transfer (EFT), the  
4435 later of the following two events:

4436 (A) The 10th day after the designated billing office receives a proper invoice from the  
4437 Contractor. If the designated billing office fails to annotate the invoice with the date  
4438 of receipt at the time of receipt, the invoice payment due date shall be the 10th day  
4439 after the date of the Contractor's invoice; provided the Contractor submitted a proper  
4440 invoice and no disagreement exists over quantity, quality, or Contractor compliance  
4441 with contract requirements.

4442 (B) The 10th day after Government acceptance of supplies delivered or services  
4443 performed by the Contractor.

4444 (ii) For all other orders, the later of the following two events:

4445 (A) The 30th day after the designated billing office receives a proper invoice from the  
4446 Contractor. If the designated billing office fails to annotate the invoice with the date  
4447 of receipt at the time of receipt, the invoice payment due date shall be the 30th day  
4448 after the date of the Contractor's invoice; provided the Contractor submitted a proper

- 449 invoice and no disagreement exists over quantity, quality, or Contractor compliance  
4450 with contract requirements.
- 4451 (B) The 30th day after Government acceptance of supplies delivered or services  
4452 performed by the Contractor.
- 4453 (iii) On a final invoice, if the payment amount is subject to contract settlement actions, acceptance  
4454 occurs on the effective date of the contract settlement.
- 4455 (2) The General Services Administration will issue payment on the due date in (a)(1)(i) above if the  
4456 Contractor complies with full cycle electronic commerce. Full cycle electronic commerce  
4457 includes all the following elements:
- 4458 (i) The Contractor must receive and fulfill electronic data interchange (EDI) purchase orders  
4459 (transaction set 850).
- 4460 (ii) The Contractor must generate and submit to the Government valid EDI invoices (transaction  
4461 set 810) or submit invoices through the GSA Finance Center Internet-based invoice process.  
4462 Internet-based invoices must be submitted using procedures provided by GSA.
- 4463 (iii) The Contractor's financial institution must receive and process, on behalf of the Contractor,  
4464 EFT payments through the Automated Clearing House (ACH) system.
- 4465 (iv) The EDI transaction sets in (i) through (iii) above must adhere to implementation conventions  
4466 provided by GSA.
- 4467 (3) If any of the conditions in (a)(2) above do not occur, the 10 day payment due dates in (a)(1)  
4468 become 30 day payment due dates.
- 4469 (4) Certain food products and other payments.
- 4470 (i) Due dates on Contractor invoices for meat, meat food products, or fish; perishable  
4471 agricultural commodities; and dairy products, edible fats or oils, and food products prepared  
4472 from edible fats or oils are—
- 4473 (A) For meat or meat food products, as defined in section 2(a)(3) of the Packers and  
4474 Stockyard Act of 1921 (7 U.S.C. 182(3)), and as further defined in Pub. L. 98-181,  
4475 including any edible fresh or frozen poultry meat, any perishable poultry meat food  
4476 product, fresh eggs, and any perishable egg product, as close as possible to, but not  
4477 later than, the 7th day after product delivery.
- 4478 (B) For fresh or frozen fish, as defined in section 204(3) of the Fish and Seafood  
4479 Promotion Act of 1986 (16 U.S.C. 4003(3)), as close as possible to, but not later than,  
4480 the 7th day after product delivery.
- 4481 (C) For perishable agricultural commodities, as defined in section 1(4) of the Perishable  
4482 Agricultural Commodities Act of 1930 (7 U.S.C. 499a(4)), as close as possible to, but  
4483 not later than, the 10th day after product delivery, unless another date is specified in  
84 the contract.

- 4485 (D) For dairy products, as defined in section 111(e) of the Dairy Production Stabilization  
4486 Act of 1983 (7 U.S.C. 4502(e)), edible fats or oils, and food products prepared from  
4487 edible fats or oils, as close as possible to, but not later than, the 10th day after the  
4488 date on which a proper invoice has been received. Liquid milk, cheese, certain  
4489 processed cheese products, butter, yogurt, ice cream, mayonnaise, salad dressings,  
4490 and other similar products, fall within this classification. Nothing in the Act limits  
4491 this classification to refrigerated products. When questions arise regarding the proper  
4492 classification of a specific product, prevailing industry practices will be followed in  
4493 specifying a contract payment due date. The burden of proof that a classification of a  
4494 specific product is, in fact, prevailing industry practice is upon the Contractor making  
4495 the representation.
- 4496 (ii) If the contract does not require submission of an invoice for payment (e.g., periodic lease  
4497 payments), the due date will be as specified in the contract.
- 4498 (5) Contractor's invoice. The Contractor shall prepare and submit invoices to the designated billing  
4499 office specified in the contract. Notwithstanding paragraph (g) of the clause at FAR 52.212-4,  
4500 Contract Terms and Conditions—Commercial Items, if the Contractor submits hard-copy  
4501 invoices, submit only an original invoice. No copies of the invoice are required. A proper invoice  
4502 must include the items listed in subdivisions (a)(5)(i) through (a)(5)(viii) of this clause. If the  
4503 invoice does not comply with these requirements, it shall be returned within 7 days after the date  
4504 the designated billing office received the invoice (3 days for meat, meat food products, or fish; 5  
4505 days for perishable agricultural commodities, edible fats or oils, and food products prepared from  
4506 edible fats or oils), with a statement of the reasons why it is not a proper invoice. Untimely  
4507 notification will be taken into account in computing any interest penalty owed the Contractor in  
4508 the manner described in subparagraph (a)(5) of this clause.
- 4509 (i) Name and address of the Contractor.
- 4510 (ii) Invoice date. (The Contractor is encouraged to date invoices as close as possible to the date of  
4511 the mailing or transmission.)
- 4512 (iii) Contract number or other authorization for supplies delivered or services performed  
4513 (including order number and contract line item number).
- 4514 (iv) Description, quantity, unit of measure, unit price, and extended price of supplies delivered or  
4515 services performed.
- 4516 (v) Shipping and payment terms (e.g., shipment number and date of shipment, prompt  
4517 payment discount terms). Bill of lading number and weight of shipment will be shown for  
4518 shipments on Government bills of lading.
- 4519 (vi) Name and address of Contractor official to whom payment is to be sent (must be the same  
4520 as that in the contract or in a proper notice of assignment).
- 4521 (vii) Name (where practicable), title, phone number, and mailing address of person to be  
4522 notified in the event of a defective invoice.
- 4523 (viii) Any other information or documentation required by the contract (such as evidence of  
4524 shipment).

- 525 (ix) While not required, the Contractor is strongly encouraged to assign an identification  
4526 number to each invoice.
- 4527 (6) Interest penalty. An interest penalty shall be paid automatically by the designated payment office,  
4528 without request from the Contractor, if payment is not made by the due date and the conditions  
4529 listed in subdivisions (a)(6)(i) through (a)(6)(iii) of this clause are met, if applicable. However,  
4530 when the due date falls on a Saturday, Sunday, or legal holiday when Federal Government offices  
4531 are closed and Government business is not expected to be conducted, payment may be made on  
4532 the following business day without incurring a late payment interest penalty.
- 4533 (i) A proper invoice was received by the designated billing office.
- 4534 (ii) A receiving report or other Government documentation authorizing payment was processed,  
4535 and there was no disagreement over quantity, quality, or Contractor compliance with any  
4536 contract term or condition.
- 4537 (iii) In the case of a final invoice for any balance of funds due the Contractor for supplies  
4538 delivered or services performed, the amount was not subject to further contract settlement  
4539 actions between the Government and the Contractor.
- 4540 (7) Computing penalty amount. The interest penalty shall be at the rate established by the Secretary  
4541 of the Treasury under section 12 of the Contract Disputes Act of 1978 (41 U.S.C. 611) that is in  
4542 effect on the day after the due date, except where the interest penalty is prescribed by other  
4543 Governmental authority (e.g., tariffs). This rate is referred to as the "Renegotiation Board Interest  
4544 Rate," and it is published in the Federal Register semiannually on or about January 1 and July 1.  
4545 The interest penalty shall accrue daily on the invoice principal payment amount approved by the  
4546 Government until the payment date of such approved principal amount; and will be compounded  
4547 in 30-day increments inclusive from the first day after the due date through the payment date.  
4548 That is, interest accrued at the end of any 30-day period will be added to the approved invoice  
4549 principal payment amount and will be subject to interest penalties if not paid in the succeeding  
4550 30-day period. If the designated billing office failed to notify the Contractor of a defective invoice  
4551 within the periods prescribed in subparagraph (a)(5) of this clause, the due date on the corrected  
4552 invoice will be adjusted by subtracting from such date the number of days taken beyond the  
4553 prescribed notification of defects period. Any interest penalty owed the Contractor will be based  
4554 on this adjusted due date. Adjustments will be made by the designated payment office for errors  
4555 in calculating interest penalties.
- 4556 (i) For the sole purpose of computing an interest penalty that might be due the Contractor,  
4557 Government acceptance shall be deemed to have occurred constructively on the 7th day  
4558 (unless otherwise specified in this contract) after the Contractor delivered the supplies or  
4559 performed the services in accordance with the terms and conditions of the contract, unless  
4560 there is a disagreement over quantity, quality, or Contractor compliance with a contract  
4561 provision. In the event that actual acceptance occurs within the constructive acceptance  
4562 period, the determination of an interest penalty shall be based on the actual date of  
4563 acceptance. The constructive acceptance requirement does not, however, compel Government  
4564 officials to accept supplies or services, perform contract administration functions, or make  
4565 payment prior to fulfilling their responsibilities.
- 66 (ii) The following periods of time will not be included in the determination of an interest penalty:  
67 (A) The period taken to notify the Contractor of defects in invoices submitted to the  
4568 Government, but this may not exceed 7 days (3 days for meat, meat food products,

- 4569 or fish; 5 days for perishable agricultural commodities, dairy products, edible fats or  
4570 oils, and food products prepared from edible fats or oils).
- 4571 (B) The period between the defects notice and resubmission of the corrected invoice by  
4572 the Contractor.
- 4573 (C) For incorrect electronic funds transfer (EFT) information, in accordance with the  
4574 EFT clause of this contract.
- 4575 (iii) Interest penalties will not continue to accrue after the filing of a claim for such penalties  
4576 under the clause at 52.233-1, Disputes, or for more than 1 year. Interest penalties of less  
4577 than \$1 need not be paid.
- 4578 (iv) Interest penalties are not required on payment delays due to disagreement between the  
4579 Government and the Contractor over the payment amount or other issues involving contract  
4580 compliance or on amounts temporarily withheld or retained in accordance with the terms of  
4581 the contract. Claims involving disputes, and any interest that may be payable, will be resolved  
4582 in accordance with the clause at 52.233-1, Disputes.
- 4583 (8) Prompt payment discounts. An interest penalty also shall be paid automatically by the designated  
4584 payment office, without request from the Contractor, if a discount for prompt payment is taken  
4585 improperly. The interest penalty will be calculated as described in subparagraph (a)(7) of this  
4586 clause on the amount of discount taken for the period beginning with the first day after the end of  
4587 the discount period through the date when the Contractor is paid.
- 4588 (9) Additional interest penalty.
- 4589 (i) If this contract was awarded on or after October 1, 1989, a penalty amount, calculated in  
4590 accordance with subdivision (a)(9)(iii) of this clause, shall be paid in addition to the interest  
4591 penalty amount if the Contractor--
- 4592 (A) Is owed an interest penalty of \$1 or more;
- 4593 (B) Is not paid the interest penalty within 10 days after the date the invoice amount is  
4594 paid; and
- 4595 (C) Makes a written demand to the designated payment office for additional penalty  
4596 payment, in accordance with subdivision (a)(9)(ii) of this clause, postmarked not later  
4597 than 40 days after the invoice amount is paid.
- 4598 (ii) (A) Contractors shall support written demands for additional penalty payments with the  
4599 following data. No additional data shall be required. Contractors shall--
- 4600 (1) Specifically assert that late payment interest is due under a specific invoice, and  
4601 request payment of all overdue late payment interest penalty and such additional  
4602 penalty as may be required;
- 4603 (2) Attach a copy of the invoice on which the unpaid late payment interest was due;  
4604 and
- 4605 (3) State that payment of the principal has been received, including the date of  
4606 receipt.
- 4607 (B) Demands must be postmarked on or before the 40th day after payment was made,  
4608 except that--



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- (1) If the postmark is illegible or nonexistent, the demand must have been received and annotated with the date of receipt by the designated payment office on or before the 40th day after payment was made; or
  - (2) If the postmark is illegible or nonexistent and the designated payment office fails to make the required annotation, the demand's validity will be determined by the date the Contractor has placed on the demand; provided such date is no later than the 40th day after payment was made.
  - (iii) (A) The additional penalty shall be equal to 100 percent of any original late payment interest penalty, except--
    - (1) The additional penalty shall not exceed \$5,000;
    - (2) The additional penalty shall never be less than \$25; and
    - (3) No additional penalty is owed if the amount of the underlying interest penalty is less than \$1.
  - (B) If the interest penalty ceases to accrue in accordance with the limits stated in subdivision (a)(5)(iii) of this clause, the amount of the additional penalty shall be calculated on the amount of interest penalty that would have accrued in the absence of these limits, subject to the overall limits on the additional penalty specified in subdivision (a)(7)(iii)(A) of this clause.
  - (C) For determining the maximum and minimum additional penalties, the test shall be the interest penalty due on each separate payment made for each separate contract. The maximum and minimum additional penalty shall not be based upon individual invoices unless the invoices are paid separately. Where payments are consolidated for disbursing purposes, the maximum and minimum additional penalty determination shall be made separately for each contract therein.
  - (D) The additional penalty does not apply to payments regulated by other Government regulations (e.g., payments under utility contracts subject to tariffs and regulation).
  - (b) Contract financing payments.
    - (1) Due dates for recurring financing payments. If this contract provides for contract financing, requests for payment shall be submitted to the designated billing office as specified in this contract or as directed by the Contracting Officer. Contract financing payments shall be made on the *[insert day as prescribed by Agency head; if not prescribed, insert 30th day]* day after receipt of a proper contract financing request by the designated billing office. In the event that an audit or other review of a specific financing request is required to ensure compliance with the terms and conditions of the contract, the designated payment office is not compelled to make payment by the due date specified.
    - (2) Due dates for other contract financing. For advance payments, loans, or other arrangements that do not involve recurring submissions of contract financing requests, payment shall be made in accordance with the corresponding contract terms or as directed by the Contracting Officer.
    - (3) Interest penalty not applicable. Contract financing payments shall not be assessed an interest penalty for payment delays.
  - (c) Fast payment procedure due dates. If this contract contains the clause at 52.213-1, Fast Payment Procedure, payments will be made within 15 days after the date of receipt of the invoice.

4653 **552.232-70 INVOICE REQUIREMENTS (SEP 1999)**

4654 (a) Invoices shall be submitted in an original only, unless otherwise specified, to the designated billing  
4655 office specified in this contract or order.

4656 (b) Invoices must include the Accounting Control Transaction (ACT) number provided below or on the  
4657 order.

4658 ACT Number (*To be provided on each, individual Task Order*)

4659 (c) In addition to the requirements for a proper invoice specified in the Prompt Payment clause of this  
4660 contract or order, the following information or documentation must be submitted with each invoice:

4661 (*As may be required on individual Task Orders*).

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4663 **552.232-78 PAYMENT INFORMATION (JUL 2000)**

4664 The General Services Administration (GSA) makes information on contract payments available  
4665 electronically at <http://www.finance.gsa.gov>. The Contractor may register at the site and review its record  
4666 of payments. This site provides information only on payments made by GSA, not by other agencies.

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4668 **552.252-6 AUTHORIZED DEVIATIONS IN CLAUSES (DEVIATION FAR 52.252-6) (SEP 1999)**

4669 (a) Deviations to FAR clauses.

4670 (1) This solicitation or contract indicates any authorized deviation to a Federal Acquisition  
4671 Regulation (48 CFR Chapter 1) clause by the addition of "(DEVIATION)" after the date of  
4672 the clause, if the clause is not published in the General Services Administration Acquisition  
4673 Regulation (48 CFR Chapter 5).

4674 (2) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation  
4675 (FAR) clause that is published in the General Services Administration Acquisition Regulation  
4676 by the addition of "(DEVIATION [FAR clause no.])" after the date of the clause.

4677 (b) Deviations to GSAR clauses. This solicitation indicates any authorized deviation to a General  
4678 Services Administration Acquisition Regulation clause by the addition of "(DEVIATION)" after the  
4679 date of the clause.

4680 (c) "Substantially the same as clauses." Changes in wording of clauses prescribed for use on a  
4681 "substantially the same as" basis are not considered deviations.

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**PART III – LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS**

**SECTION J –LIST OF ATTACHMENTS**

- Attachment 1:** The contractor's technical proposal dated 27 June 2007, revisions dated 10 December 2007 and responses to technical questions dated 10 December 2007 are incorporated by reference into the contract.
- Attachment 2:** The contractor's subcontracting plan dated 10 December 2007, is incorporated by reference into the contract.
- Attachment 3:** Amendments A001, dated 24 July 2007, and A002, dated 16 November 2007, to solicitation GSV07PD0007 are incorporated by reference into the contract.